

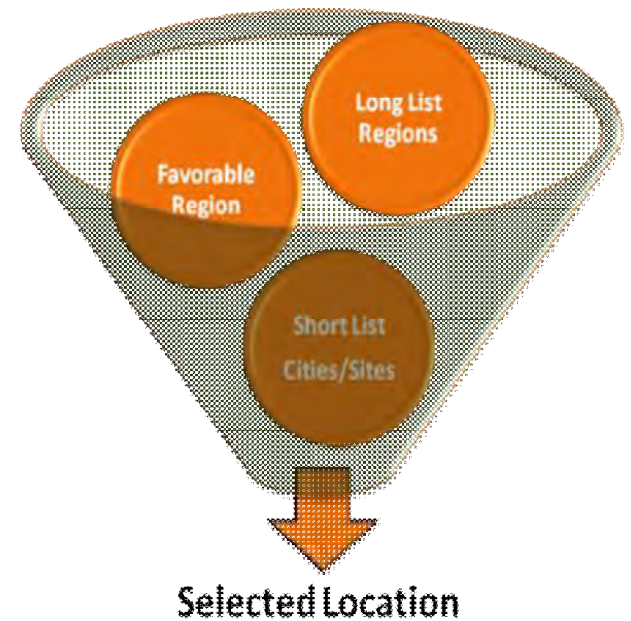
Appendix A

Site Selection Analysis Report

Site Selection – Scope and Objectives

- 1) Agribusiness Market Analysis/Inventory
Industrial Real Estate Assets
- 2) Location Requirements of Right Fit
Agribusiness Operations
- 3) Site Selector Perceptions of Erie County as a
Business Location

Location Selection is a
Process of Elimination



Site Selector Objectives	Scope of Work
<p>1) Agribusiness Market Analysis / Inventory County Industrial Real Estate Assets: Identify specific agribusiness industrial sub-sectors for which Erie County possesses suitable location, infrastructure and related competitive advantages.</p>	<p>Inventory county industrial real estate assets, developed and undeveloped, and assess the overall suitability of each property for agribusiness growth sectors. The list of growth sectors emerges from a collaboration between the site selector and project team members identifying agribusiness market trends.</p>
<p>2) Location Requirements of Right Fit Agribusiness Operations: Determine general community and property requirements for targeted agribusiness sectors and look for alignment of these requirements with county real estate and community assets.</p>	<p>The site selector will provide a comprehensive list of location requirements associated with selected agribusiness industry sectors and facility types (e.g. raw product processing, manufacturing, distribution). These requirements will be used by the project engineering team to determine the suitability of individual properties for targeted agribusiness sectors.</p>
<p>3) Site Selector Perceptions of Erie County as a Business Location: Survey professional site selection consultants to determine if they are aware of Erie County location attributes and development opportunities aligned with agribusiness.</p>	<p>Conduct phone interviews with site selection consultants active in locating agribusiness projects in order to understand prevailing opinions about Erie County. Explore these opinions to look for common threads that may exist which point to reasons for a lack of interest in choosing Erie as a location for new and expanding industry.</p>

Preferred Sites from Existing Inventory*

#11 Eastport Commerce Center

#13 Evans Industrial Park

#14 Grand Island Gateway

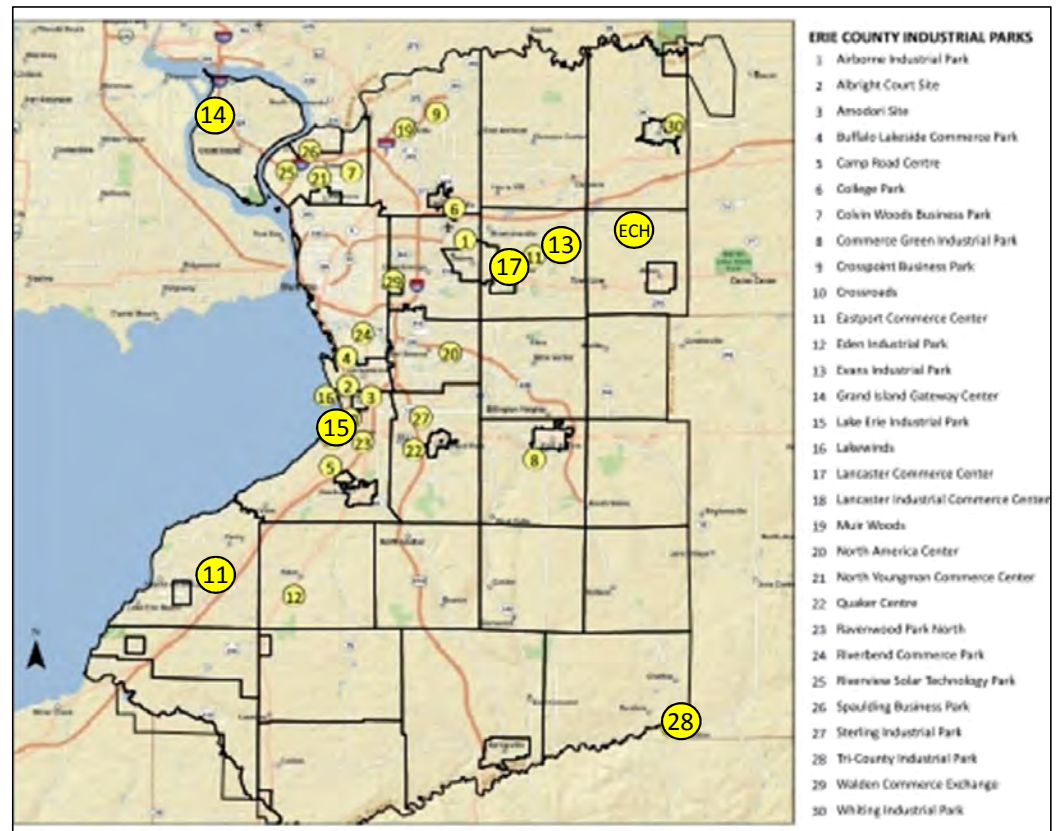
#15 Lake Erie Industrial Park

#17 Lancaster Commerce Center

#28 Tri-County Industrial Park

ECH Erie County Home Site

*Erie County Industrial Parks Report,
December 2015





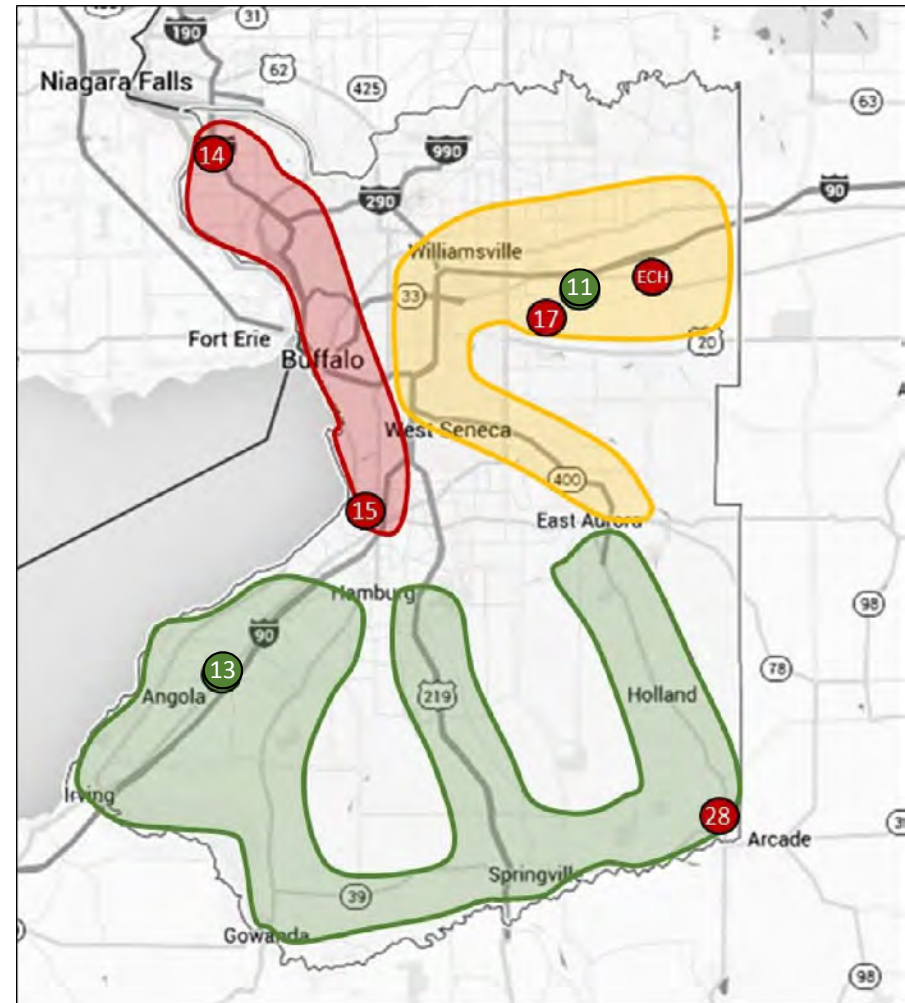
1) Alignment of Erie County Land Assets with Agribusiness Market Strategies

-  Urban Industrial Core – area of heavy industrial operations dependent on major utility and water or rail transportation requirements
-  Urban Fringe – area suitable for light manufacturing, distribution and industrial service operations
-  Rural and Small Town – area suitable for light industrial and distribution, particularly agricultural based operations

Investigated Sites

-  11 Eastport Commerce Center
-  13 Evans Industrial Park
-  14 Grand Island Gateway
-  15 Lake Erie Industrial Park
-  17 Lancaster Commerce Center
-  28 Tri-County Industrial Park
-  ECH Erie County Home Site - Alden

-  Recommended for further investigation
-  Non-recommended property



EASTPORT COMMERCE CENTER

PROPERTY MAP



PROPERTY SUMMARY

Address:
Walden Avenue at Pavement Road, Town of Lancaster

Owner:
Uniland Development Company
University Corporate Parkway
Amherst, New York 14226
(716) 834-5000 or www.uniland.com

Site Description:
Greenfield site, manufacturing and distribution

Utilities:
* Water—Erie County Water Authority
* Sewer—Erie County Sewer District
* Natural Gas—National Fuel
* Electricity—National Grid

SITE STATISTICS

Status & Type:
Ready to market and build | Industrial/Warehousing
Special Designation:
Certified Shovel-Ready through Build NOW NY

Total Acres:
128 +/-
Available Acres:
128 +/-

Zoning:
Manufacturing

Building Design Standards:
Developer Controlled

Access Road:
Eastport Drive

Current Tenants:
None

UPDATES

- Site infrastructure is complete
- Site is being marketed

ISSUES

- None

ERIE COUNTY INDUSTRIAL PARKS REPORT
MARK C. POLONCARZ, COUNTY EXECUTIVE



ERIE COUNTY INDUSTRIAL PARKS REPORT
MARK C. POLONCARZ, COUNTY EXECUTIVE



Recommended for Further Investigation - Property Advantages and Disadvantages

Site #11 - Eastport Commerce Center

Advantages:

- Established industrial park in a clean environment well suited to agribusiness operations
- Utility infrastructure is in place and appears to be well suited for industrial operations
- Site is mostly flat and soils appear suitable for industrial buildings
- Good highway access
- Area already has the makings of an agribusiness manufacturing cluster with other agribusiness related operations located nearby

Disadvantages:

- Existing park roadway and utility infrastructure put limitations on the size and configuration of developable sites
- Eastport Commerce Center's approximate 100 acres of developable land is not adequate to host a large number of operations. However, development of agribusiness operations here would further establish this area as an agribusiness cluster. There are vacant lands nearby that could be developed as the need arises.
- Residential development directly to the north may hinder development of some types of agribusiness operations in the park
- As this is an established industrial park, land costs are likely to be high relative to some alternatives which may deter some companies from locating here

EVANS INDUSTRIAL PARK

PROPERTY MAP



PROPERTY SUMMARY

Address:
Eden-Evans Center Road, Town of Evans, NY

Owner:
Delaware Marketing and Management, Inc.
Richard Tonchia
(716) 947-4769

Site Description:
Former Angola airport, also has rail access to Norfolk Southern Railroad

Utilities:
 * Water—Erie County Water Authority
 * Sewer—Erie County Sewers
 * Natural Gas—National Fuel Gas (line not at site)
 * Electricity—National Grid

SITE STATISTICS

Status & Type:
In Process | Industrial/Flex

Special Designation:
None

Total Acres: 138 +/-

Available Acres: 138 +/-

Zoning:

Manufacturing

Building Design Standards: N/A

Access Road:

Eden-Evans Center Road, former runway is access road

Current Tenants:

None

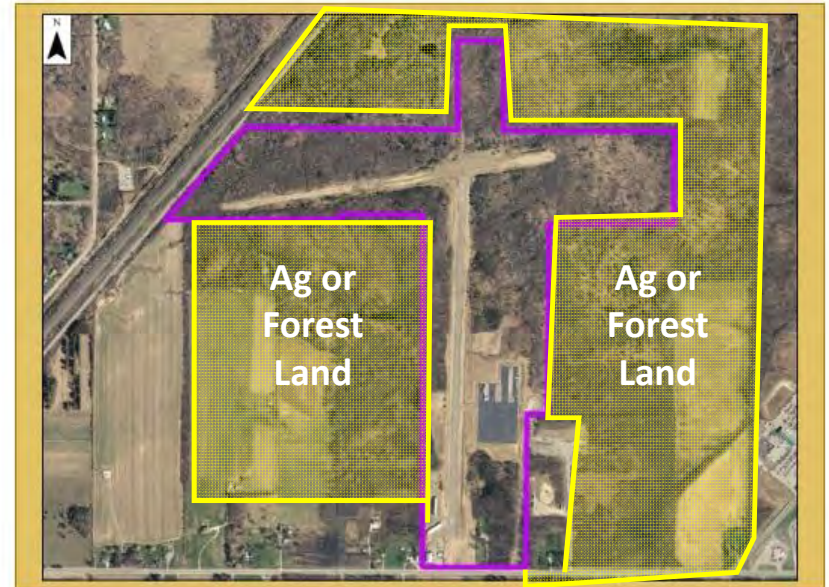
UPDATES

- * Planning studies for conversion to industrial park are complete
- * Located two miles from Interstate 90
- * Adjacent to Norfolk Southern main rail line

ISSUES

- * Site is former Angola Airport
- * Needs infrastructure to be available for industrial park use
- * Existing runway will be main access road

ERIE COUNTY INDUSTRIAL PARKS REPORT
MARK C. POLONCARZ, COUNTY EXECUTIVE



ERIE COUNTY INDUSTRIAL PARKS REPORT
MARK C. POLONCARZ, COUNTY EXECUTIVE



Recommended for Further Investigation - Property Advantages and Disadvantages

Site #13 - Evans Industrial Park

Advantages:

- Large flat property zoned industrial
- Property is located in a part of Erie County rich in agricultural resources that align with some agribusiness sectors
- Significant vacant lands surrounding the site that could be added to make this a large and recognizable industrial development
- Excellent access to NY State Thruway
- Rail access from Norfolk Southern is possible

Disadvantages

- Water and sewer infrastructure is reportedly limited and will require investment to ensure capacities can meet the needs of targeted agribusiness sectors

Reasons for Non-Recommended Properties

Site #14 - Grand Island Gateway	<ul style="list-style-type: none"> • Site access requires transit of toll bridge and congested highways • Wetlands restrict development of large portions of the property • Neighboring chemical plant may be viewed as undesirable by agribusiness companies
Site #15 - Lake Erie Industrial Park	<ul style="list-style-type: none"> • Site is divided by a roadway limiting the size and configuration of industrial operations • FedEx acquired the northern half of the site for a new distribution facility further limiting the availability of land
Site #17 - Lancaster Commerce Center	<ul style="list-style-type: none"> • Site is long and narrow limiting the size and configuration of industrial facilities • Access to highways is made difficult by mainline rail lines that separate the site from interstate highway access
Site #28 - Tri-County Industrial Park	<ul style="list-style-type: none"> • Site is distant from interstate highways limiting the types of operations suitable for this location • The land owner is reported to have a history of conflicts with government officials which places unknown risks for moving forward at this location
Site ECH - Erie County Home Site, Alden	<ul style="list-style-type: none"> • The expansive complex of closed and occupied structures will require significant time and money to remove which is not in keeping with moving forward aggressively with the agribusiness attraction strategy • A large prison is located directly across the highway. Many corporate executives avoid locating in proximity to prison. • Wetlands restrict development of large portions of the property

2) Location Requirements for *Right-fit* Agribusiness Operations:

	Erie County Industrial Districts		
	Lakefront Industrial Core	Eastern Urban Fringe	Rural South
Agribusiness Facility			
Dry Goods Food Manufacturing	X	X	X
Fresh Fruit Processing		X	X
Refrigerated Food Products		X	X
Salad-in-a-Bag		X	
Hydroponics Vegetables	X	X	X
Distribution Center	X	X	X



Example of Modern “ponics” Operation

Overton County Tennessee hydroponics facility:

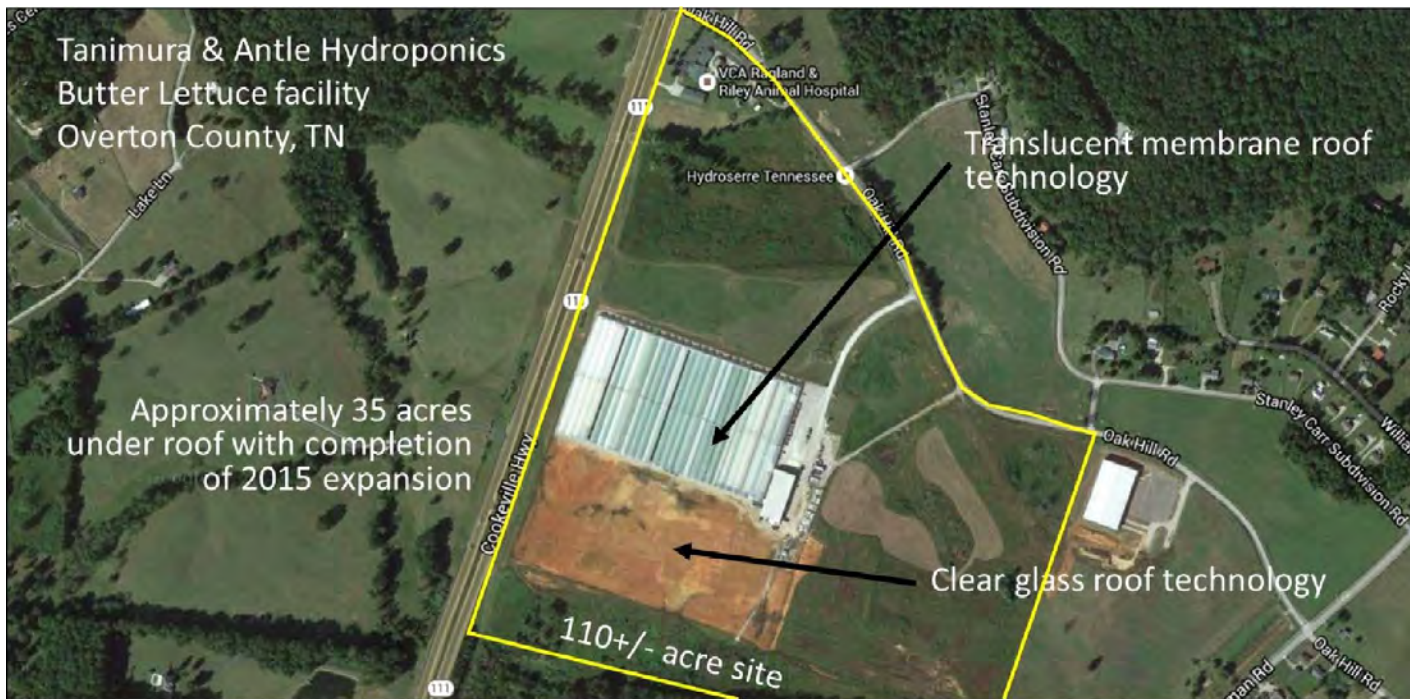
Initial facility located in 2006 as joint venture with HydroNov (based in Mirabel, QE) developer of the hydroponics technology

- T&A bought out HydroNov and improved on the technology with industry leading innovations
- \$15 million investment
- Community gave the land to T&A (\$2 million value) and the State of TN graded the site (\$1.5 million)
- 100 acre site, 50 acres currently under roof with room for 80 acres
- 100 employees
- 26 growing rooms, 72,000 plants per room
- 40 to 65 days seed to harvest (depends on sunlight: time of year)
- Facility serves 7 state market
- 6 day per week operation
- Ship on average 3 to 4 truckloads per day
- Value proposition: 2 to 3 days from harvest to grocery store shelf (versus 6 to 8 days from west coast and Mexico). Fresher product supports higher price
- Low water/waste water use (growing water is reused)
- High natural gas use to heat growing area
- Minimal use of chemicals (pesticides and fertilizers)



North America is seeing a significant trend of growing fresh produce in a controlled environment closer to consumer markets.

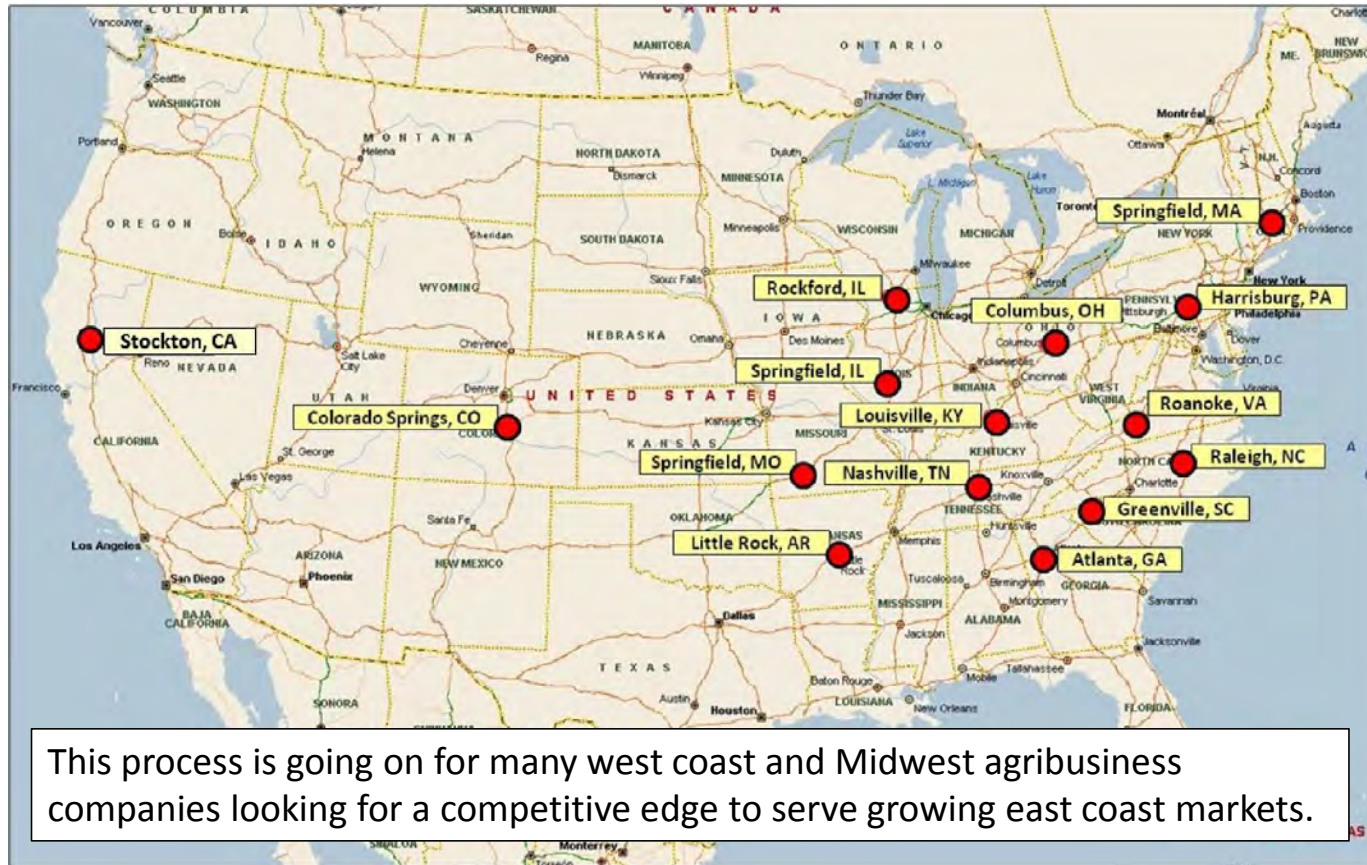




Overview of Site Selection Process

Comparison of Location Alternatives
through an Application of Project
Requirements

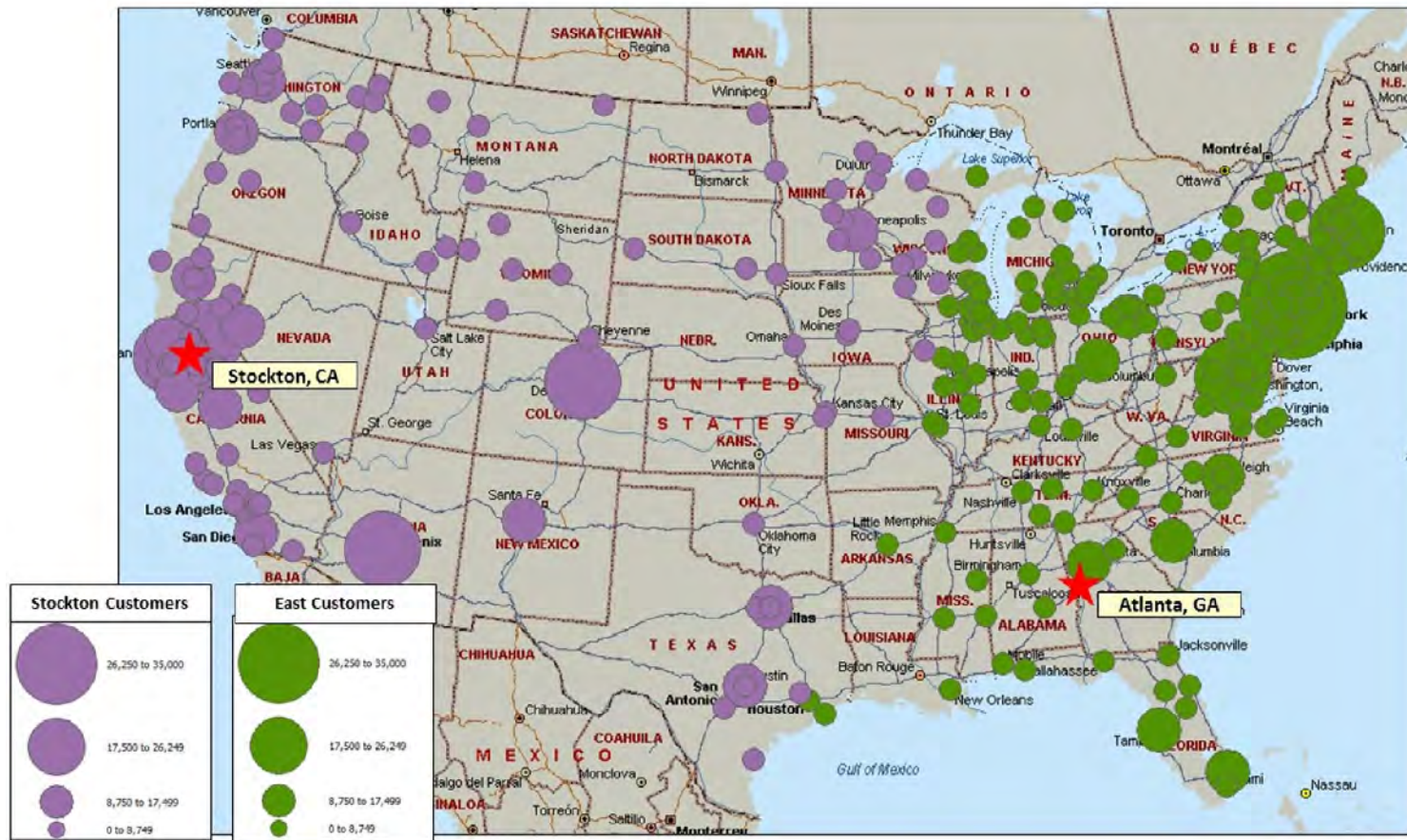
Select Cities for Testing a West Coast Operation in Conjunction with a New Processing Facility



Establish Optimal Allocation of Resources

Customer Allocations for Stockton (existing) and Atlanta (new) Facilities

Each trial city is tested in alignment with the existing west coast operation.



Selecting the “Best” Pairing of Existing and New Locations

Estimated Total Annual Variable Operating Costs
Benchmark (Stockton only) versus Two Facilities (Stockton plus New Plant)

How Erie County will emerge from a national location search.

2015	Benchmark	Facilities - 2 Plants (Stockton plus New Plant)													
	Stockton	Atlanta	Colorado Springs	Columbus	Greenville	Harrisburg	Little Rock	Louisville	Nashville	Raleigh	Roanoke	Rockford	Springfield IL	Springfield MA	Springfield MO
Inbound Trans	\$6,115,456	\$5,956,597	\$6,994,808	\$5,478,364	\$7,001,958	\$6,524,180	\$5,739,030	\$6,861,298	\$6,198,447	\$7,282,900	\$6,443,401	\$5,185,668	\$5,530,311	\$6,749,864	\$5,806,464
Outbound Trans	\$40,240,929	\$18,600,881	\$27,362,403	\$17,666,527	\$17,800,794	\$15,218,044	\$22,409,534	\$18,557,531	\$19,116,643	\$17,118,780	\$16,516,793	\$20,955,738	\$20,804,733	\$15,791,789	\$22,752,556
Labor	\$16,475,014	\$15,403,146	\$15,434,101	\$16,088,005	\$15,562,410	\$15,607,057	\$15,039,805	\$15,439,016	\$15,620,014	\$15,806,005	\$15,192,670	\$15,962,154	\$15,076,376	\$16,276,174	\$14,306,038
Utilities	\$3,747,975	\$3,803,313	\$3,070,593	\$3,337,743	\$3,026,793	\$3,773,133	\$2,971,953	\$2,999,853	\$3,245,553	\$3,245,445	\$3,253,593	\$3,460,953	\$3,403,833	\$3,198,333	\$3,857,553
Property Taxes	\$3,190,000	\$4,801,400	\$5,973,100	\$2,251,200	\$7,800,500	\$2,632,300	\$4,260,000	\$4,092,100	\$4,993,500	\$4,429,200	\$6,692,200	\$2,579,700	\$2,597,700	\$10,182,000	\$2,352,000
TOTAL	\$69,769,374	\$48,565,337	\$58,835,005	\$44,821,839	\$51,192,455	\$43,754,714	\$50,420,322	\$47,949,798	\$49,174,157	\$47,882,330	\$48,098,658	\$48,144,212	\$47,412,953	\$52,198,160	\$49,074,611
Penalty Over Base	\$26,014,660	\$4,810,622	\$15,080,291	\$1,067,125	\$7,437,740	Base	\$6,665,608	\$4,195,083	\$5,419,443	\$4,127,615	\$4,343,943	\$4,389,498	\$3,658,238	\$8,443,446	\$5,319,897
Index	159	111	134	102	117	100	115	110	112	109	110	110	108	119	112

Columbus and Harrisburg emerge as low cost regions for the new facility. Next step is to screen communities in a search area around these locations. The search area could include portions of neighboring states.

3) Site Selector Perceptions of Erie County as a Business Location

Location Consultant	Title	Company and Location	Years of Experience
Michelle Comerford	Industrial and Supply Chain Practice Leader	Biggins Lacy Shapiro & Co. / Cleveland, OH Office	14
Jay A. Garner, CEcD, CCE, FM, HLM	President & Founder	Garner Economics, LLC / Atlanta, GA	25
Don Schjeldahl	Principal	DSG Advisors, Inc. / Kent, OH	33
Frank Spano	Managing Director	Austin Consulting / Cleveland, OH Office	28
Jerry Szatan	Owner	Szatan & Associates / Chicago, ILL	21
Gregg Wassmansdorf	Senior Managing Director	Newmark Grubb Knight Frank, Global Corporate Services / Toronto, ON Office	18

Erie County Agribusiness Challenges and Opportunities

Observations from Site Selector Interviews

Challenges:

- The region's "rustbelt" legacy is still a factor in how outsiders view the region.
- Brownfield industrial sites, including abandoned grain silos, reinforce impressions that the region is not suitable for development.
- Few corporate managers and site selectors are aware of Erie County's broad array of development assets.
- There is a general unfamiliarity with Erie County and who represents economic development interests.
- Severe winter weather is perceived as a serious business risk.

Opportunities:

- Abundant utility capacity and transportation infrastructure set the region apart from many parts of the country
- The national trend for agribusiness companies to produce product closer to consumer markets favors Erie County.
- Increased amounts of locally grown produce and dairy are creating demand for processing facilities.
- An agribusiness industrial park could be a catalyst for branding Erie County as an "agribusiness friendly" location.

Survey Form – Open Ended Question Format

1. Have you worked on a project you could classify as “Agribusiness”?
2. Have you looked at NY State for an agribusiness project?
3. What is your opinion of New York State as a location for business?
4. Are you aware that western New York has been successful in attracting a number of major agribusiness projects in recent years (Dannon, Barilla, Chobani)?
5. When I say Erie County New York, what does that mean to you? Do you know where this is?
6. Have you been to Erie County?
7. Have you looked at Erie County for a project?
8. Did you receive a proposal from an ED organization? If yes, was it good?
9. Economic Development Effectiveness: What ED organizations do you associate with NY, Erie County?
 - Erie County IDA
 - Buffalo Niagara Enterprise
 - National Grid
 - Empire State Development
 - Other?
10. Can you differentiate Erie County assets from one part of the county to another?
11. When it comes to these factors important to agribusiness companies how does Erie County rate?
 - Access - Raw Materials/Markets
 - Transportation Infrastructure
 - Real Estate Portfolio
 - Utilities/Infrastructure
 - Workforce/Training
 - Business Environment
 - Business Costs
 - Organizational Effectiveness
 - Risk
 - Quality of Place
12. Closing comments?

Summary of Findings from Interviews

Survey Question	Summary of Site Selector Responses
1. Worked an Agribusiness project?	All – YES
2. Looked at NY for agribusiness?	5 – YES / 1 – NO (all have worked projects in NY)
3. Opinion of NY as business location?	2 – POSITIVE / 2 – NOT GOOD, NOT BAD / 2 – POOR
4. Aware of western NY agribusiness success?	All – YES (ranges from hearsay to extensive knowledge)
5. Do you know Erie County, NY?	2 – NO / 3 – Buffalo? / 2 - YES
6. Have you been to Erie County?	All - YES
7. Have you looked at Erie County for a project?	5 – NO / 1 – YES (financial services project)
8. Have you received a proposal from Erie?	5 – NO / 1 – YES (financial services project)
9. ED organizations associated with Erie County?	
• Empire State Development	All – YES (opinions reflected in #3)
• Erie County IDA	All – Don't know this organization
• Buffalo Niagara Enterprise	All – YES (everyone knows Tom K.)
• National Grid	4 – YES / 2 – NO (mixed views on effectiveness)
• Other?	All - NONE
10. Can you differentiate Erie County assets?	All – NO awareness other than urban Buffalo

What Agribusiness is Looking for in a Community	Erie County Strengths / Weaknesses / Gaps	Recommended Action	Priority Hi-Med-Low
Access - Raw Materials/Markets	Raw material/market access are a strength. A large portion of North American consumer and industrial markets are within a 500 mile one-day truck drive. Supply chains for numerous industries are well developed within that same 500-mile radius.	Stay up-to-date on market and supply chain trends within a multi-state and eastern Canada region.	LOW

What Agribusiness is Looking for in a Community	Erie County Strengths / Weaknesses / Gaps	Recommended Action	Priority Hi-Med-Low
Transportation Infrastructure	This is a strength. Highway, rail, water, and airport resources are well developed and support the efficient flow of goods and people.	Continue to build and maintain transportation infrastructure.	LOW

What Agribusiness is Looking for in a Community	Erie County Strengths / Weaknesses / Gaps	Recommended Action	Priority Hi-Med-Low
Real Estate Portfolio	Erie County appears to lack a sufficient supply of ready sites and building to support industry. This is particularly so for sites and buildings in clean environments suitable for agribusiness operations.	Even the best community won't win projects if they lack land and building assets ready to serve the needs of industry. Get on top of real estate assets and make sure a lack of suitable properties is not holding back investment.	HIGH

What Agribusiness is Looking for in a Community	Erie County Strengths / Weaknesses / Gaps	Recommended Action	Priority Hi-Med-Lo
Utilities / Infrastructure	The urbanized areas of Erie County appear to be well served by water, waste water, and electric utilities. Natural gas availability is not as clear. Utility services in non-urbanized areas is not clear.	Understanding system capacities, reliability, distribution networks, and costs are essential ingredients in corporate location decisions. Make sure a clear and concise explanation of Erie County utility offerings is part of the economic development message.	MEDIUM

What Agribusiness is Looking for in a Community	Erie County Strengths / Weaknesses / Gaps	Recommended Action	Priority Hi-Med-Lo
Workforce / Training	<p>Erie County's reputation on workforce is tied to Buffalo's rustbelt legacy. The good aspects of this include a belief that the region is home to highly trained machinists and workers skilled in other industrial trades. The negative side of this is that these workers are getting old and skilled workers are not entering the workforce to replace them.</p>	<p>Over the last decade labor availability has risen to be the most important location factor for new facilities. Assess regional workforce characteristics and training resources and address gaps that exist.</p>	HIGH

What Agribusiness is Looking for in a Community	Erie County Strengths / Weaknesses / Gaps	Recommended Action	Priority Hi-Med-Lo
Business Environment	<p>The region's rustbelt legacy is still a factor in how outsiders view Erie County. Site selectors tie what they know about Buffalo to the County as a whole.</p> <p>Brownfield industrial sites, including abandoned grain silos along the lake, reinforce impressions that the region is an area in decline.</p>	<p>The reality is quite different as many companies have transitioned to a new globally competitive economy. Getting this message out will chip away at rust belt legacy. Can we take down the grain silos and continue redevelopment of the lakefront?</p>	MEDIUM

What Agribusiness is Looking for in a Community	Erie County Strengths / Weaknesses / Gaps	Recommended Action	Priority Hi-Med-Lo
Business Costs	Erie County, like other counties around the U.S. that are home to old industrial cities, has a reputation as a high cost location. The reality is likely quite different.	Document operating costs for different types of operations located in urban and rural areas of the county. Make this a part of the County's economic development value proposition.	MEDIUM

What Agribusiness is Looking for in a Community	Erie County Strengths / Weaknesses / Gaps	Recommended Action	Priority Hi-Med-Lo
Organizational Effectiveness	<p>Buffalo Niagara Enterprise has done a good job of positioning itself as the economic development agent for the region. Beyond its role as a conduit for information, BNE has been unsuccessful in conveying Erie County's value proposition. Few corporate managers and site selectors are aware of Erie County's broad array of development assets, particularly rural development opportunities.</p>	<p>Develop an Erie County brand that speaks to business retention and attraction around well-defined industry targets. Agribusiness as a target can clearly be supported in Erie County. Establish a marketing plan for getting the word out.</p>	HIGH

What Agribusiness is Looking for in a Community	Erie County Strengths / Weaknesses / Gaps	Recommended Action	Priority Hi-Med-Low
Risk	<p>Erie County suffers from a number of perceived risk factors that play a role in corporate location decisions. Some risks are associated with the County as a whole like severe winter weather and operating in New York State (e.g. high taxes, bureaucratic government, over regulation). Other perceived risks stem from Buffalo's "rust belt" industrial history (e.g. militant unions, high labor costs, environmental</p>	<p>Inventory Erie County risk factors, real and perceived, and develop mitigation strategies for each. For perceptions that are blatantly false, explain realities with well documented and unbiased facts. For perceptions that reflect a truth, shine light on the issue including how the community is dealing with the challenge. Winter weather, for example, can be addressed by showcasing the County's large fleet of snowplows and the resilience of County</p>	HIGH

Agribusiness Branding

Examples of Economic Development
Organizations that Effectively Brand
their Region Around Agribusiness and
Food Processing

<http://www.growgallia.com/Key-Industries/Agribusiness-Food-Processing.aspx>

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Manufacturing

Agribusiness & Food Processing

Major Employers

Agribusiness & Food Processing

Ohio offers a rich food production sector and robust workforce to

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Agriculture/Food Processing

Food processing in Southwest Michigan dates back to when the area was first settled by European inhabitants in the early 1800s. The area's rich fertile soil earned it the nickname "The Celery City" when Dutchman Cornelius De Bruin began growing celery in the black muck along the banks of the Kalamazoo River and his family began peddling the vegetable door to door.

With the invention of the corn flake in Battle Creek by W.K. Kellogg in 1906, the region's ability to take a product from raw material and process it into another terrific edible form was established. Today,



<http://buffaloniagara.org/IndustryClusters/Agribusiness>

BUFFALO NIAGARA ENTERPRISE
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Agribusiness

TOOLS for Agribusiness

- ▶ Agribusiness Video
- ▶ Agribusiness Report
- ▶ Successes
- ▶ Dairy Maps
- ▶ Dairy Processing Brochure
- ▶ Breweries & Distilleries Map

Genesee Valley Agribusiness Park

Agribusiness Dairy Breweries & Distilleries Real Estate Education Workforce

Agribusiness

Buffalo Niagara is a major player in New York State's agriculture industry, particularly in the dairy industry, of which New York State is a leading producer. Which is why more agribusinesses are finding Buffalo Niagara to be the ideal place to dign in. Learn

BUFFALO NIAGARA ENTERPRISE

BNE does a good job of marketing regional agribusiness assets,
but that does not include Erie County.



Appendix B

Marketing Analysis Report

Erie County Agri-business Park

Market Analysis

March, 2016

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Introduction

This industry targeting study for the Erie County Agribusiness Park Development is intended to identify the potential industries that could succeed in the agribusiness park as well as the steps necessary to attract and maintain these industries. This study consists of three stages:

1. *Analysis of Existing Conditions* in Erie County's economy based on its population, labor force, stakeholder interviews and existing businesses and industries.
2. *Description of Market Trends and Potential Industry Targets* that are the core opportunities for Erie County based on food processing industry trends, market analysis, expert recommendations, and specific opportunities on the horizon in Erie County.
3. *Recommendations*, identifying the optimum strategy and next steps Erie County should take for the development of the agribusiness park.

An Industry Ecosystem as a Marketing Tool. The overall findings of the study indicate that Erie County is certainly a competitive location for an agri-business park for several types of food processing industries. The key to success for the park is to embed it in a strong food processing "ecosystem." For example, as is discussed in this report, there are opportunities in dairy processing. The region's ample supply of fluid milk is important in that regard. But the opportunities in dairy processing can't be fully realized unless the all of the requisite assets are combined into a system that can support a dairy processor. This includes the transportation network, land/facilities available at competitive prices, a food manufacturing workforce (and training capacity), a cadre of producers services (i.e., companies that can provide services to keep the machinery and related processes up and running) and governments familiar with the regulatory/approvals process for such enterprises. Many of these components are in place in Erie County. The essential task in creating and marketing a successful agri-business park will be to build strong relationships among these components so that Erie County can boast an unparalleled system that supports food processors. The park then becomes one component of the County's sustained competitive advantage for food processors.

1. Analysis of Existing Conditions

The Buffalo Niagara region has a long history of successful agriculture and agribusiness enterprises. As of 2013, there are 596 food-processing facilities in the Buffalo Niagara Region. The region is the number one producer of milk in NYS, which is the 3rd highest milk producing state in the country. The Buffalo Niagara region Current food processors in the region include Lactalis, Coca Cola, Goya Food, and Upstate Niagara Cooperative. Buffalo Niagara has a well-developed rail system and access to 69 million people within a 300-mile radius. ¹

Labor Force Analysis

Tables 1 through 3 show population

demographics for the Buffalo Niagara Region as well as Erie County. The majority of Buffalo Niagara's population resides in Erie County. Both Buffalo-Niagara and Erie County's population is aging, with around 23 percent of the population over 60. Erie County is well educated, as 31.8% of the po

pulation has a Bachelor's degree or higher. This is above Buffalo Niagara at 27.36 percent and the national average of 28.8 percent.

Tables 4 and 5 show employment information for the County. Only 0.66% of the population in Erie is employed in agriculture, forestry, or fishing and 0.92% in the Buffalo Niagara region. However, approximately 8% are

Table 1: Population				
	Buffalo-Niagara		Erie County	
	Population	% of total	Population	% of total
Total	1,536,500		923,681	
Female	784,790	51.08	447,260	51.58%
Male	751,710	48.92	476,421	48.42%
Source: Buffalo Niagara Enterprise, Applied Geographic Solutions, 2015				

Table 2: Age Distribution				
	Buffalo Niagara		Erie County	
	Total	Percent	Total	% of total
0-19	360,136	23.44	215,789	23.26
20-39	390,191	25.39	242,877	26.29
40-59	417,911	27.2	248,271	26.88
60+	368,262	23.9	216,744	23.47
Source: Buffalo Niagara Enterprise, Applied Geographic Solutions, 2015				

Table 3: Educational Attainment		
	Buffalo Niagara	Erie County
	% of total	% of total
Less than High School	9.9	9.43
High School	31.73	28.15
Some College	18.97	18.83
Associate Degree	12.03	11.79
Bachelors Degree	15.22	17.47
Grad Degree	12.14	14.33
Source: Buffalo Niagara Enterprise, Applied Geographic Solutions, 2015		

¹ Buffalo Niagara Enterprise, "Agribusiness Industry Report, March, 2014.

employed in manufacturing, and 4.5% in transportation and communications in both Erie and Buffalo Niagara.

The employees of these two sectors could serve as assets to the agribusiness park. By occupation, approximately 7 percent are production workers and 3.5 percent are transportation workers in Erie and Buffalo Niagara.

Table 4: Employment by Sector		
	Buffalo	Erie County
Total Employees	775,577	532,638
	%	%
Agriculture, Forestry, Fishing	0.92	.66
Mining	0.08	.05
Construction	3.11	3.13
Manufacturing	8.77	8.17
Transportation and Communications	4.54	4.38
Wholesale Trade	5.39	5.29
Retail Trade	19.51	19.91
Finance, Insurance, and Real Estate	6.36	7.81
Services	44.18	44.56
Public Administration	6.59	5.4
Unclassified	0.54	0.63
Source: Buffalo Niagara Enterprise, Applied Geographic Solutions, 2015		

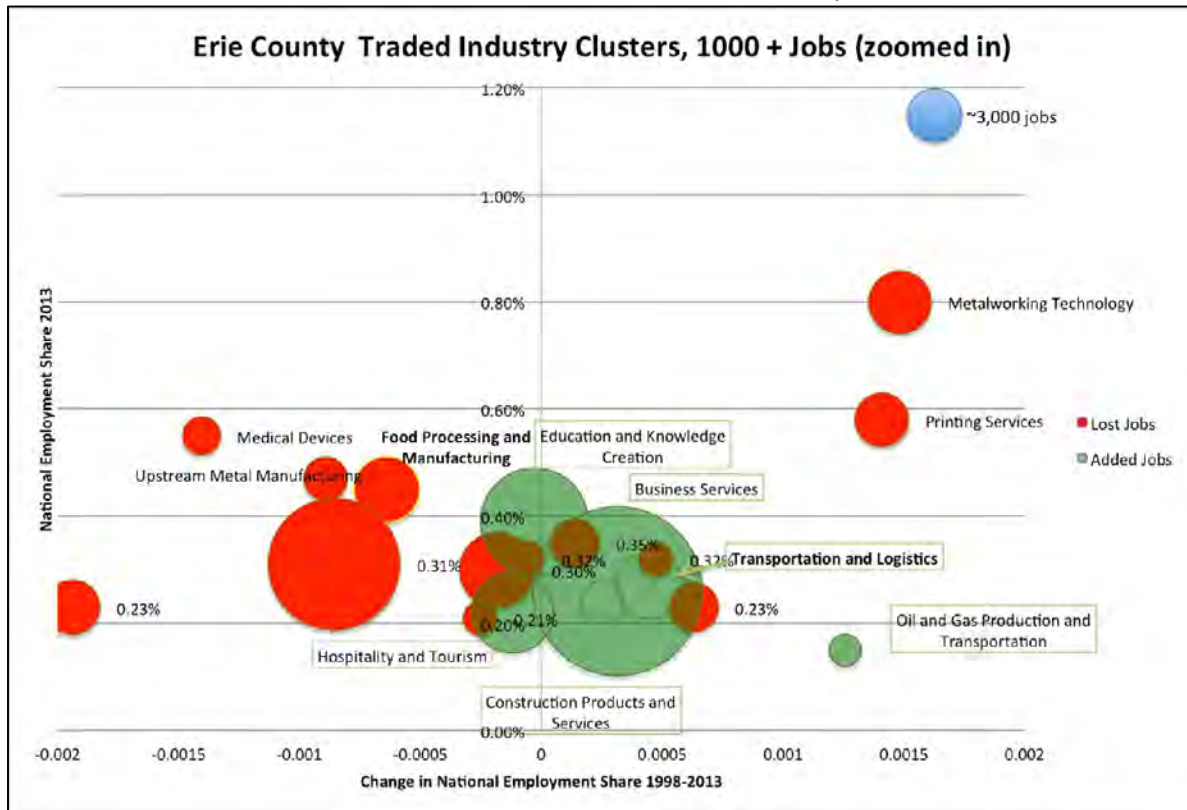
Cluster Analysis

To identify clusters, or regional concentrations of related industries, the US Clusters Project, a web-based application developed by the Harvard Business School for the US Economic Development Administration was used as a resource. The results of this analysis are displayed below in Figure 1.

Table 5: Employees by Occupation				
	Buffalo Niagara		Erie County	
Employees by Occupation	Total	%	Total	%
Executives, Managers, and Administrators	58,683	7.22	38,046	7.14
Business and Financial Operations	28,222	3.47	20,013	3.76
Computer and Mathematical Occupations	10,571	1.30	7,334	1.38
Architecture and Engineering	10,988	1.35	7,130	1.34
Life/Physical/Social Science Occupations	4,110	0.51	2,629	0.49
Community and Social Services	18,759	2.31	11,950	2.24
Legal	6,858	0.84	5,019	0.94
Education/Training/Library	61,664	7.59	38,294	7.19
Health Diagnosing and Treating Practitioners	39,796	4.90	27,262	5.12
Health Technologists/Technicians	15,968	1.97	10,836	2.03
Healthcare Support	25,632	3.15	17,613	3.31
Protective Services	19,913	2.45	11,510	2.16
Food Preparation/Serving	49,366	6.08	31,375	5.89
Building and Grounds Maintenance	28,970	3.57	19,310	3.63
Personal Care and Service	32,390	3.99	20,485	3.85
Sales	94,581	11.64	63,836	11.98
Office and Administrative Support	123,702	15.23	82,554	15.50
Farming/Fishing/Forestry	2,156	0.27	894	0.17
Construction and Extraction	31,122	3.83	20,407	3.83
Installation/Maintenance and Repair Workers	26,308	3.24	16,749	3.14
Production Workers	61,363	7.55	38,752	7.28
Transportation Workers	28,925	3.56	19,098	3.59
Material Moving	19,337	2.38	12,583	2.36
Source: Buffalo Niagara Enterprise, Applied Geographic Solutions, 2015				

The US Clusters Project has been constituted as a set of tools for examining long-term structural conditions in a local economy to better understand the groupings of businesses that are particular catalysts for economic activity in that area.

Figure 1.
Selected “Traded” Clusters in Erie County.



Source: US Economic Development Administration, *Cluster Mapping Project*.

The horizontal axis of the graph in Figure 1 shows the County cluster’s change in the share of national employment in that cluster from 1998 to 2013. The vertical axis shows the county cluster’s current share in national employment in that cluster as of 2013. The “bubbles” for each cluster illustrate its relative size in terms of employment. The colors of the bubbles indicate whether the cluster has gained employment (indicated by a green color) or lost employment (signified by a red color) over the fifteen years between 1998 and 2013.

Food processing and manufacturing, though providing over 1,000 jobs, lost jobs in Erie County, and had a negative change in national employment share from 1998-2013. This was a trend throughout Western, NY. Erie County's largest, growing industries are business services, education and knowledge creation, and hospitality and tourism, which is common in New York State. Behind these three large and growing industries are production technology and heavy machinery, transportation and logistics. These industries are potential support industries for food processing. Note also, that Erie County's strength in business services may provide advantages to the County as a location for an agri-business park.

Concentration of "Producer Services" in Erie County

One aspect of the regional economy which favors Erie County as a location for an agri-business park is the concentration of particular "producer services" in the County. Producer services are business services that provide services and support to manufacturers. As was pointed out in the stakeholder interviews, one of the attractions Erie County has for food processors considering expanding or relocating into the County is that Erie has the highest concentration of such services of all of the counties in the Buffalo/Niagara region.

For example, Table 6 displays the number of business establishments in

Table 6. Size of Commercial & Industrial Machinery & Equipment (except Automotive & Electronic) Repair & Maintenance (NAICS 8118) by County, 2013.

County	Paid employees for pay period including March 12 (number)	Number of establishments	% of Total for Region
Allegany	0	0	0.0%
Cattaraugus	under 20	1	1.1%
Chautauqua	51	10	11.2%
Erie	356	58	65.2%
Genesee	87	12	13.5%
Niagara	20 to 100	1	1.1%
Orleans	under 20	3	3.4%
Wyoming	under 20	4	4.5%
Source: US Census Bureau, County Business Patterns.			

each county that were classified as "commercial & industrial machinery & equipment (except automotive and electronic) repair & maintenance" operations in 2013. Erie County has 58 such establishments, accounting for almost two-thirds of all such businesses in the larger region. Of the seven other counties in the region, only Chautauqua and Genesee have more than 10 such businesses (10 and 12 respectively). Erie has a total of 356 employees in the County that work for such establishments. Genesee has the second highest number of total employees in such businesses at only 87 workers.

Summary of Stakeholder Interviews

Stakeholder input is an essential component of the research process. Interviews were conducted with food processors, site selectors, agricultural experts, and economic developers in Erie County. Over fifty individuals and organizations were contacted by email and phone. Fourteen interviews were completed. A list of those contacted and interviewed is included in the appendices to this report.

The interviews served to identify the strengths and weaknesses of Erie County as well the types of enterprises that show potential for growth in Erie County. Stakeholders saw potential for food processing and/or distribution in Erie County due to its history as a food distribution hub, regional agricultural production, relationship to Canada, and consumers' growing preference for local food. Stakeholders identified several challenges to face before Erie County can expand its food processing capacity. These include infrastructure such as transportation, power access, and the need for coordination between all levels of production from farmer to retail.

Potential types of food processing

Stakeholders identified a number of potential target industries for the Erie County Agri-Business Park. These include large-scale greenhouses, milk processing, meat processing, grape processing, broccoli cooling facilities, malt and barley processing for breweries, grain distribution, sweetener production, as well as corrugate, resin and plastics for food packaging. Stakeholders expressed that bringing an "anchor" industry into the agribusiness park would then attract other industries. The idea of creating a "hub" or a food distribution center was also a common suggestion.

Milk processing could be this anchor industry for Erie County. According to the National Agricultural Statistics Services, milk is Erie County's number one commodity by total sales.² According to stakeholders, milk processing has potential for growth in Erie County. Upstate Niagara indicated that its business is growing and it needs to expand its facilities to meet this growth. Expansion is possible in yogurt, cottage cheese, sour cream, and dairy based dips. Upstate also expressed the need for facilities to produce packaging for its dairy products.

² National Agricultural Statistics Service, 2012

Food hubs, or regional distribution centers aggregate and manage the distribution of local food products. Erie County has a food hub; Eden Valley is a “vegetable growing farm cooperative.” They store, market, and distribute produce from ten different farms to locations throughout the Eastern United States. Eden Valley expressed a desire to expand and/or begin processing their produce. Historically, Erie County was a grain hub that acted as a gateway to the Midwest, and is still a prime location for food distribution.

Opportunities

Erie County has assets that make it a desirable place to locate an agribusiness park. Multiple stakeholders identified affordable electric prices as a major asset. Electric prices in Canada are currently higher than in Erie County, which could potentially attract food processors from Canada to Erie County. Erie County also has access to ample fresh water resources. One stakeholder suggested marketing it as the “fresh water capital.” As is discussed below, Cornell researchers have identified multiple areas in western New York that could successfully grow broccoli, starting an East Coast broccoli industry. These growers would need cooling facilities. However, currently, there is not a sufficient volume of broccoli under cultivation at the present time to support a cooling facility. Craft breweries are growing in popularity and a malt and barley processing and distribution center was suggested as a potential food-processing niche. However, New York State does not currently grow quality malt and barley.

Challenges

Stakeholders identified several challenges to growth in agribusiness in Erie County. Several stakeholders expressed concern about the access to labor. Another concern was the perception that development in New York State is slow and cumbersome. Stakeholders saw New York’s environmental/regulatory environment and slow administrative response as impediments to development. Energy and development experts stated that any large agribusiness facility would need reliable power and redundancy in the grid. These types of facilities require access to large amounts of fresh water as well as wastewater treatment. Experts emphasized that agribusiness/industrial parks take time and a significant amount of planning to be successful. For example, some of the types of industries that show potential would require coordination with growers, such as broccoli, malt, and barley.

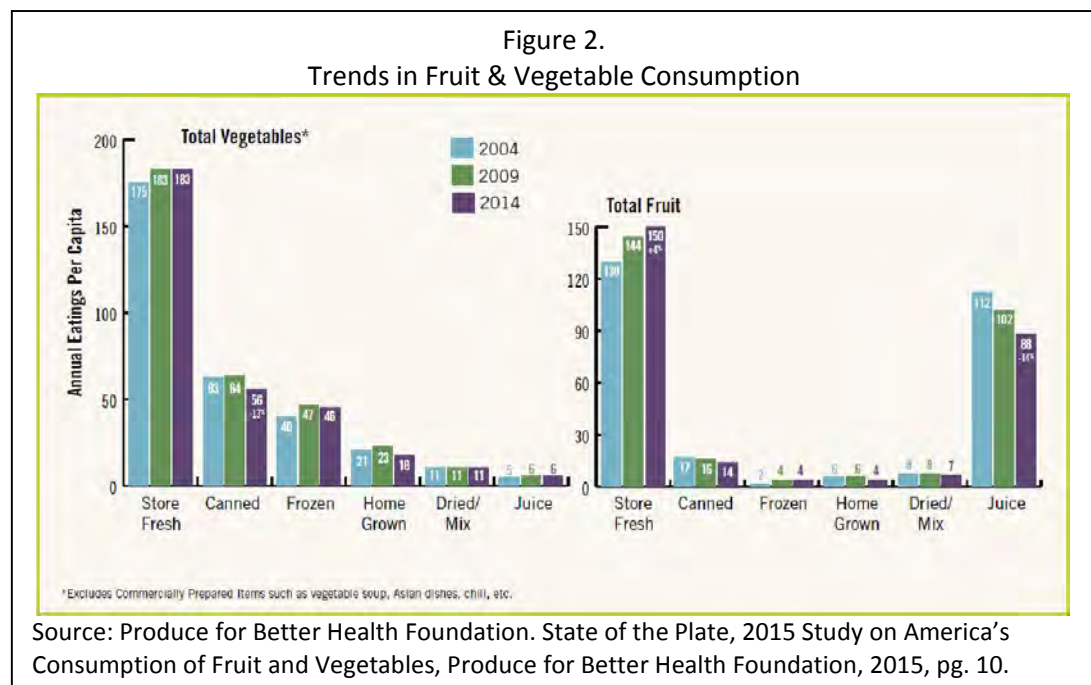
2. Market Trends

The food-processing sector has shown continued growth during the economic recovery. The market features modest growth and is becoming increasingly fragmented. In North America's mature economy, the food industry market is saturated. As incomes rise, a smaller and smaller portion of income is spent on food. Due to high competition in the market, more money is spent on value added enterprises rather than on the food itself. 80% of each dollar spent on food goes toward marketing, transportation, processing, and distribution. To compete, businesses are looking for innovations to reduce labor costs, increase

production, innovate, and differentiate from competitors.³

Consumer Trends

As shown in Figure 2, fruit and vegetable consumption, including fruit



juice, has declined 7% since 2010. However, "as is" fruit consumption has increased among children and adults 18-44. Looking forward, overall fruit and vegetable consumption is expected to increase by 4%, consistent with population growth over the next 5 years. Per capita, fresh fruit consumption is expected to increase by 5% and fresh vegetable consumption by 4% over the next 5 years.⁴

³ Ridgetown College, University of Guelph Economics Research Group, "Food industry Growth Trends in Ontario's Southwest Region," September 2003

⁴ Produce for Better Health Foundation. State of the Plate, 2015 Study on America's Consumption of Fruit and Vegetables, Produce for Better Health Foundation, 2015. Web. <<http://www.PBHFoundation.org>>.

Fresh Convenience

Convenience is an increasingly important factor in US food consumption trends. The decline in vegetable consumption in recent years is largely due to the decrease in vegetable side dishes served at home dinners.⁴ Sales of “semi-prepared” fruits and vegetables have increased, despite costing sometimes double the cost of the unprepared produce. Salad kits or “salad in a bag” grew 26% from 2012-2013.⁵ Super markets have increased their offerings of snack vegetables and pre-cut fruit by 20%.⁵

A desire for convenience means that more consumers are eating out at restaurants or fast food establishments. Nearly 2/3 of people frequent a fast food restaurant such as McDonalds, or Subway, or a coffee shop like Starbucks or Panera within a 2-week period.⁴

The biggest factor that could improve fruit and vegetable consumption away-from-home is assuring that more fruit and vegetables are sold in fast food restaurants.⁶

Food processors may find new markets for pre-cut and “snack pack” fruit and vegetable products by partnering with fast food and coffee shop establishments.

Natural Ingredients

Despite a decline in fruit and vegetable consumption over the past 5 years, consumers are seeking products with more natural ingredients. Increased awareness and health concerns are making customers shy away from artificial dyes, preservatives, and sweeteners. This has affected the cereal industry, snack, beverage, and frozen food industry.⁷ Kellogg’s, General Mills, and Nestle have all moved toward more natural flavors and coloring. This could present an opportunity for agribusiness to fill the need for natural ingredients and innovation in processing.

⁵ Nielson, “[Convenience, It’s What’s For Dinner Tonight: 2014 Brings a Fresh Take on Making Meals With Ease](#)”, Jan 30, 2014

⁶ Produce for Better Health Foundation. State of the Plate, 2015 Study on America’s Consumption of Fruit and Vegetables, Produce for Better Health Foundation, 2015. Web. <http://www.PBHFoundation.org>, p. 49.

⁷ Oliver, David, “Top 10 food and beverage industry trends and why they matter,” FoodDive.com, August 26, 2015, <http://www.fooddive.com/news/top-10-food-and-beverage-industry-trends-and-why-they-matter/404484/>

Industry Trends

Consolidation

Consolidation is a recent trend especially among dry goods food manufacturing and commodity food processors. In this mature market, food-processing companies are looking to minimize competition and create economies of scale. In 2012, and 2013 there were over 300 mergers and acquisitions. Food processors made up 34% of those deals.⁸ Recent mergers and acquisitions include the Kraft Heinz merger, which resulted in the closing of seven plants. Large companies looking to benefit from the consumer trend toward healthy foods are buying smaller, niche health food companies. For example, Mondelez's acquisition of Enjoy Life Foods, a company that specializes in snacks free from allergens, and Hershey's acquisition of Krave, a high-end jerky company⁷.

Food processors have fared well through the recession. Growth is driven by the rise of smaller regionalized facilities. That trend is somewhat dampened by the countervailing trend toward leaner, flexible facilities that can consolidate operations that were previously handled in several plants.

Recent consolidations have not been because of economic hardship, but rather to reach new and wider markets and to gain access to resources such as workforce and transportation. This means that areas with access to supply, transportation, skilled workforce and markets, have an opportunity to attract new firms to the area⁹.

Location factors for Food Processors

Regional production is today's trend, and that will continue. Logistics dictate site selection and hauling finished goods halfway across the North American continent doesn't make economic sense.⁹ - Kevin T. Higgins

The food processing industry is changing rapidly due to market fragmentation. Consumer preferences have expanded into new categories such as ethnic, gluten free, frozen, and organic. This change presents opportunities for expansion and new firm attraction. However, in such a competitive market, food processors require a location with specific qualities. Bridor Inc, Safeway Food Group, and Allied Specialty Foods all recently expanded their operations in New Jersey. These three food processors cited

⁸ Goldsberry, Clare, "Market Report: Food Processing Companies Grow at a Steady Pace," Area Development, 2014, <http://www.areadevelopment.com/FoodProcessing/Q2-2014/food-processing-industry-consolidation-expansion-28198122.shtml>

⁹ Kevin T. Higgins, "Food Plants of the Future: Not Bigger, Just Smarter." *Food Processing*, September 5, 2013

proximity to producers, access to a trained workforce, and incentive programs as the reasons why they decided to expand or relocate in the Cumberland, NJ area.¹⁰ Lehigh Valley, PA has proven to be a prime location for many food processors, such as Ocean Spray, Samuel Adams, and Nestle. Lehigh Valley boasts proximity to major metropolitan areas such as Philadelphia and New York City, reliable transportation infrastructure, and superior water quality¹¹.

Food processing facilities must be able to meet the demand for fresh food. Certain produce such as micro greens have a shelf life of only one week. For such perishable produce, swift transportation is of utmost importance. This means facilities should be located close to both markets and suppliers. A highway, railroad, or both should be in close proximity to the facility to expedite shipment to markets. Food processors prefer intermodal transportation to meet these needs, utilizing shipping containers that can easily be transferred from truck to train.¹²

Eastern Broccoli Project

Researchers have identified broccoli as an important crop that could become a staple of the East Coast regional food economy. Broccoli is a high-value specialty crop. It has a farm gate value of \$896 million. However, 90% of broccoli production occurs in California. Only 4% of broccoli production occurs on the East Coast¹⁰. This, combined with the growing demand for local food sparked the idea for the Eastern Broccoli Project, a system-wide effort to create an East Coast broccoli industry. Thomas Bjorkman, Project Director of the Eastern Broccoli Project at Cornell was among the stakeholders interviewed for this project. He indicated that researchers at Cornell, the USDA, and multiple universities are working to develop a type of broccoli that can endure the warm and variable eastern summers. In addition, they are identifying potential growing sites, defining a potential grower network, and plotting transportation, cooling, and distribution systems.

Broccoli cooling facilities are an essential part of the broccoli production process. To ensure maximum shelf life, broccoli must be rapidly cooled and then stored at 0 degrees Celsius, however it cannot freeze.

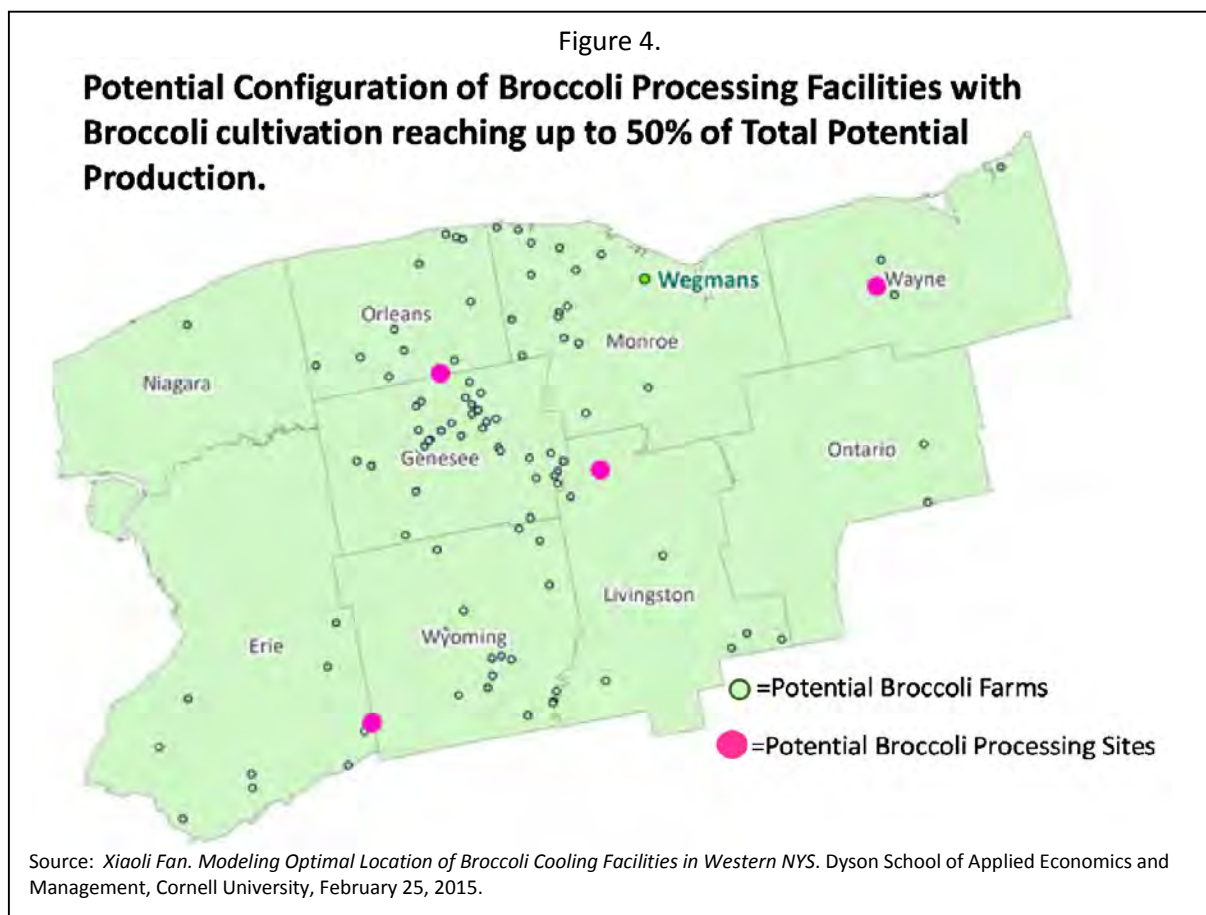
¹⁰ Area Development Research Desk, "Incentives, Trained Workers Help Food Processors to Grow in Cumberland County, New Jersey," Area Development 2015, <http://www.areadevelopment.com/stateResources/newJersey/Incentives-Workers-Food-Processors-Cumberland-NJ-0988991.shtml>

¹¹ Area Development Research Desk, "Food & Beverage Processing Firms Drawn By the Right Mix of Assets in Lehigh Valley, PA" Area Development, 2015

<http://www.areadevelopment.com/stateResources/pennsylvania/Food-Beverage-Processing-Firms-Lehigh-Valley-PA-098877.shtml>

¹² Vaught, John, Senior Vice President, Transwestern, "Keep It Fresh: Re-evaluating the Food Manufacturing Supply Chain," Area Development, 2015

Broccoli cooling facilities usually use liquid ice, but some also use hydro-cooling or forced- air-cooling. The Cornell researchers created a model for locating broccoli cooling facilities such that each location would minimize total travel time from the growers' field to the processing facility and from the processing facility to markets in the New York City metropolitan area. Figure 3 shows the results of that research. Multiple sites in Erie County have been identified as potential broccoli growing sites, shown by the green dots. The map also displays those locations that would be logical locations for processing facilities in terms of minimizing overall transportation costs as pink dots. Note that the model shows that Erie County could host a processing site in Sardinia near the border with Wyoming County. While this is an intriguing possibility, the Cornell analysis does not automatically qualify Erie County as a site for such a facility.



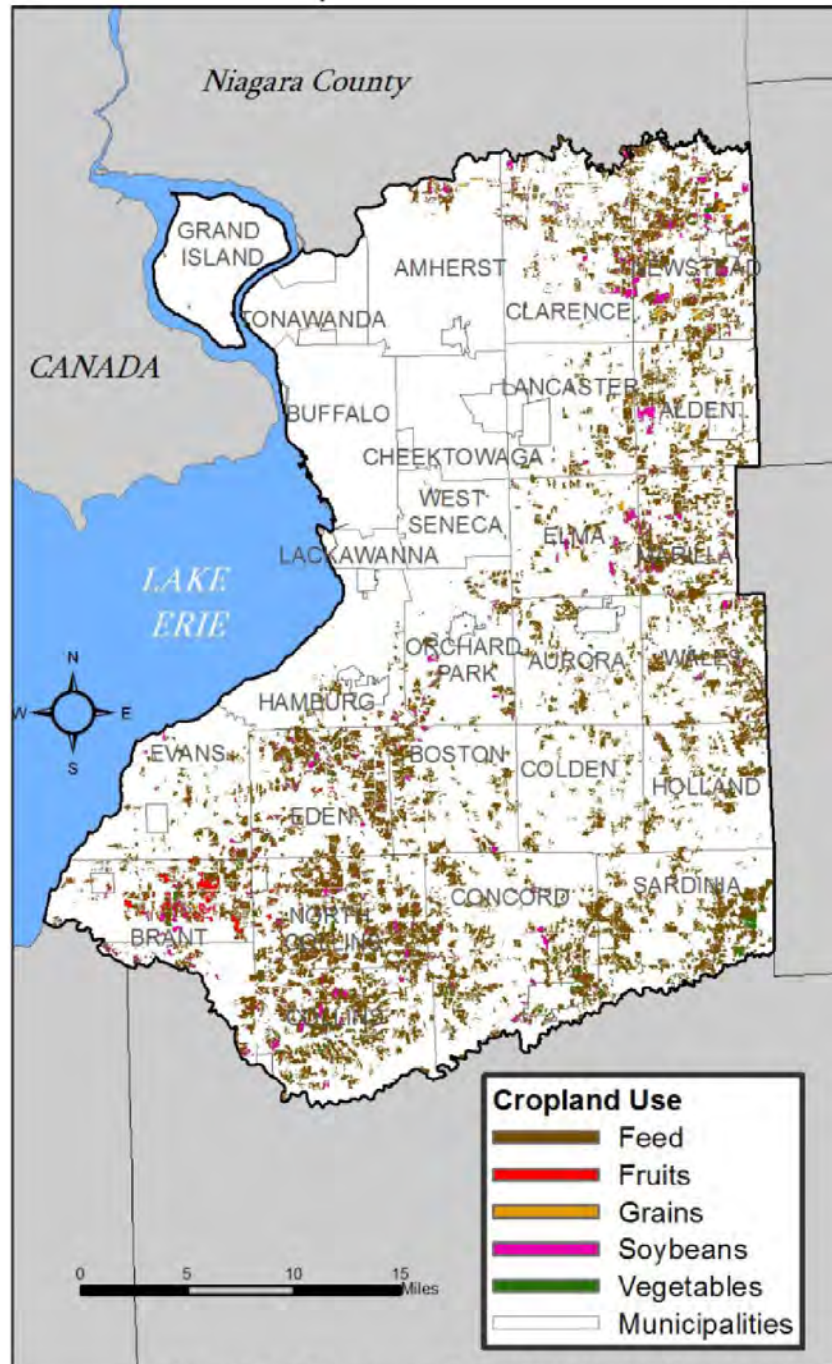
Note that, as shown in Figure 5, most of the crop production in Erie is in feeds and fruits with virtually no broccoli cultivation in the County at this time. Thus, realizing the potential for such a facility would require both recruiting a firm interested in launching such an operation as well as working with growers

to plant sufficient land in broccoli to support the processing facility. Though broccoli production and broccoli cooling show potential in Erie County, fully realizing this opportunity would require identifying and securing a potential operator as well as coordination with growers to develop a local supply of broccoli.

The Aging of Existing Dairy Processing Facilities

Another opportunity for Erie County stems from the fact that the County and the greater region has long hosted a variety of dairy processors. Many of these operations are in facilities that are at least ten years old or more. Consequently, they either are considering or shortly will be considering modernizing their facilities either at their current location or at a new facility in a new location.

Figure 5.
Use of Cropland in Erie County by Food Product, 2011.



(Map: Authors. Data Source: USDA, NRCS. Cropland Data Layer, 2011.

USDA, NRCS of Erie County, New York, Common Land Unit, 2011.

Erie County Department of Environment and Planning, Parcel Data, 2011.)

Source: Room at the Table: the Food System in Erie County, SUNY Buffalo Department of Urban & Regional Planning, 2011, p 82.

This is a particularly interesting opportunity for the County's proposed agri-business park. Such firms are already in the area and have an existing support structure in terms of dairy supply and producer services. The County itself has several long-established dairy processors in the area, including Rich Products, Upstate Farms Cooperative, Steuben Foods, Abbott's Frozen Custard, Instantwhip Buffalo and Galbani. Those that are in older facilities could potentially improve their competitiveness by expanding in or relocating to a site that provides better access to market and to the dairy supply and support network in and around Erie County.

Controlled Environment Agriculture

The "salad in a bag" trend combined with consumers' preference for locally sourced produce presents an opportunity for Erie County. Bagged salads have a shelf life of approximately 2 weeks starting from the moment the greens are harvested, if properly cooled and sealed. Therefore, regional production of produce is preferable to shipping products from further distances in areas such as Erie County, where there is a limited field-growing season for greens such as those used in bagged salads. However, the use of high-tech greenhouses and controlled environment agriculture (CEA) can extend the growing season to year-round production and reduce the distance to markets.

According to the Cornell CEA Program, "CEA is an advanced and intensive form of agriculture, where plants are grown within controlled environments, in order that horticultural practices can be optimized.¹³" CEA encompasses myriad growing techniques ranging from simple greenhouse growing to high tech automated systems. The CEA industry is a growing sector due to several advantages it has over traditional agriculture, including water efficiency, reduced pesticide and fertilizer usage, and the ability to grow food in a range of locations and climates. However, these types of facilities require significant initial investment as well as a technically trained workforce¹⁴. Potential CEA applications in Erie County include the large scale hydroponic, aquaponic, and aeroponic industries.

Hydroponics is the practice of growing plants without soil. Plants can be suspended in water with their roots submerged or some hydroponics systems suspend roots in an inert medium, such as foam or plastic, in water. Without access to the nutrients found in soil, hydroponic growers must add nutrient

¹³ Albright, Louis D., Langhans, Robert W., "Controlled Environment Agriculture Scoping Study," Controlled Environment Agriculture Program, Cornell University, 1996

¹⁴ Goddek, Simon et al., "Challenges of Sustainable and Commercial Aquaponics" *Sustainability* **2015**, 7(4), 4199-4224; doi:[10.3390/su7044199](https://doi.org/10.3390/su7044199) Published: 10 April 2015

solutions to the water. Water is recycled within the system, ensuring minimal loss of water or nutrients to the outside environment. Hydroponics systems rely on computerized sensors to maintain optimum nutrient levels, water aeration, and pH. These are very delicate systems that must be monitored closely and require technically trained employees. Hydroponic techniques and system compositions are varied.

Aquaponics is similar to hydroponics in that vegetables are grown in water in the absence of soil. However, aquaponics adds the extra element of raising fish in the water in which the plants are growing. The fish waste provides fertilizer for the plants and the plants filter the water for the fish. This nearly closed loop system eliminates the need to add nutrients to the water. It is incredibly efficient in biomass (plant and fish) produced per square foot. When using a food-grade fish, growers can optimize their earning potential by also selling the fish meat. Aquaponics systems in the Northeast are scarce and small scale. Aquaculture is traditionally practiced in warmer climates because food fish such as tilapia and catfish require water temperatures around 75 degrees. However, in the Northeast, ornamental fish such as koi and goldfish can be used in aquaponics to serve the function of providing nutrients to the plants. These ornamental fish can also be sold for use in ponds rather than as food.

Aeroponics was pioneered by NASA scientists in order to grow food in space. Aeroponics is the process of growing plants in air or mist without soil and without being submerged in water. Aeroponics has some significant growing advantages. The first is ease of transplanting. As the roots are not bound to either soil or another medium, young delicate plants can be easily transplanted without damaging the roots. Secondly, aeroponics allows for easy vertical growing, optimizing use of space¹⁵.

According to the USDA, from 2007-2012 there was a 54% increase in wholesale value of greenhouse produce grown in New York State. The national market demand for local food has grown from \$1 billion to \$7 billion since 2009. However, 95% of the lettuce, tomatoes, and spinach consumed by New Yorkers comes from out of state. US Greenhouse produce sales are currently over \$3 billion and are estimated to reach over \$4 billion by 2020. The total number of industry firms in hydroponics is forecast to increase at an average annual rate of 2.8 %.¹⁶

¹⁵ National Aeronautics and Space Administration "Progressive Plant Growing Has Business Booming," *Spinoff*, Originating Technology/NASA Contribution 2006

¹⁶ Cornell Center for Controlled Environment Agriculture, Infographic "How Indoor Agriculture is a Boon to New York Foodies." Indoor Agriculture Conference, October 15, 2015.

Examples of High Tech CEA Greenhouses

CEA Capital Holdings 100 acre indoor greenhouse site

CEA Capital Holdings is a start-up based in Akron Ohio. They specialize in building high-tech greenhouses that use hydroponics technology. They are a relatively new company with most of their greenhouses based in Ohio. They plan to expand across the country, starting in Clay, NY.

Their plan for a 100-acre greenhouse has been chosen by Governor Cuomo as part of the Upstate Revitalization Initiative and will receive significant funding over the next five years. The facility will be in the White Pine Commerce Park, an over-300-acre industrial park owned by the Onondaga County Industrial Development Agency. CEA plans to grow their Clay facility to 100 acres over 5 years in 20-acre increments¹⁷.

Though CEA Capital Holdings has declined to comment on the project, Cornell professor and hydroponic expert Neil Mattson has stated that, "CEA chose the Clay location because it is flat, undeveloped, inexpensive land with access to natural gas and electrical service and close to major highways."²²

CEA plans to grow leafy greens and tomatoes. Their system will be very advanced, using climate control and robotics technology. Though, the system will be automated, the project has a job creation potential of up to 1,000 jobs when in full operation.²²

<http://www.ceacapitalholdings.com/>

Rising Costs in Canada

Due to Erie County's proximity to Canada, Canadian food processing trends are of particular interest. Ontario is a hub for food processing in Canada, with over 3,000 food and beverage processing companies. It is the third largest food and beverage-manufacturing sector in North America. Ontario however is facing some challenges. Costs have risen steeply in utilities, energy, and waste management.

¹⁷ Moriarty, Rick "Taxpayers will subsidize indoor farm for Syracuse suburbs, but what exactly is it?," Syracuse.com, Dec 27, 2015, http://www.syracuse.com/business-news/index.ssf/2015/12/taxpayers_will_subsidize_indoor_farm_for_syracuse_suburbs_but_what_exactly_is_it.html

In addition, the Canadian dollar has become weaker, which has decreased exports and made Ontario less competitive worldwide.¹⁸

The Canadian food processing industry is deeply entwined with the United States. In 2013, the US exported C\$21.3 billion of agricultural products to Canada. 14.8% of all US food and agricultural products are exported to Canada, mainly for food and beverage processing. In 2012, the Canadian food and beverage processing industry exported approximately C\$24 billion, with 67% of that going to the United States¹⁹. The US is also the primary destination for Canadian dairy exports, but that number is declining, presenting an opportunity for Western, NY to replace Canadian imports¹.

The rising cost of manufacturing in Ontario is driving manufacturers to the US. Ontario's electricity prices are higher than surrounding provinces and the United States. This is due to what is called the Global Adjustment. The Global Adjustment is the difference between the market price of power and the price guaranteed to energy producers to encourage the transition to more sustainable energy sources. This adjustment can be a credit or a charge placed on the consumer depending if market prices are high or low. Since market prices are currently low, Ontario manufacturers are paying 4-5 times the wholesale price.²⁰ The Buffalo Niagara region is becoming increasingly attractive to Ontario manufacturers who could save millions by relocating.

¹⁸ Alliance of Ontario Food Processors, "Ontario's Food and Beverage Processing Industry Strategy," October 2013

¹⁹ Jenkins, Sonya, "An Updated Overview of the Canadian Food Processing Sector," Global Agricultural Information Network, Date: 12/17/2014
GAIN Report Number: CA14117

²⁰ McKenna, Barrie, "Ontario drives manufacturers away with overpriced electricity," The Globe and Mail, Published Sunday, Oct. 13, 2013
7:18PM EDT, <http://www.theglobeandmail.com/report-on-business/economy/ontario-drives-manufacturers-away-with-overpriced-electricity/article14854752/>

3. Recommendations

This section of the report summarizes the market opportunities for an agri-business park for Erie County and recommends an action plan to begin to attract and/or develop those opportunities into actual tenants for the park.

The market analysis indicates that Erie County is certainly a competitive location for an agri-business park. However, the County is not an overwhelming hands-down choice for firms seeking such a facility. Part of the process of cultivating tenants must be to build upon the advantages the county has to secure prospective tenants as effectively as possible. This is addressed in the action plan below.

Opportunities

Our analysis has identified several potential market opportunities for an agri-business park in Erie County. These are described below.

Dairy processing: As indicated in the market analysis, dairy processing is an important opportunity for Erie County's agri-business park. There are established processors in the County and the region who may be considering modernizing their facilities and improving their location. Such enterprises could be an important anchor tenant for the park. Thus, part of the marketing for the park should involve outreach to larger dairy processor in the area to explore their interest in expanding or relocating as part of a facility upgrade. In addition, the plentiful milk supply in the region may be an attraction to other dairy processors developing new products or niches. Attraction efforts for such firms should be part of the marketing of an agri-business park.

Organic Vegetables/Specialty Produce: The market analysis has indicated that there is a rapidly growing demand for organic vegetables and specialty fresh produce (e.g., "salad in a bag"). This is an important emerging opportunity for the County. The County is well positioned with the soils base, support industries and transportation infrastructure to serve Northeastern markets with these products. Taking advantage of this opportunity would be somewhat complex in that it would require identifying the growers to supply the enterprise as well as working with the prospective tenant to develop the facility itself. The presence of the Eden Valley Cooperative in the County could be a major boost to this

effort. While not heavily involved in processing at this point, Eden Valley has indicated that, over the coming years, it is an option they will be considering to add more value to their operations. In order to take advantage of any processing opportunities coming from Eden Valley, Erie County should maintain close contact with them and keep abreast of their evolving plans for processing.

Controlled Environment Agriculture: As the demand for fresh, organic produce grows, the possibilities for attracting or developing controlled environment agriculture to the County should increase. As with organic/specialty produce, the County has the infrastructure (including water supply) to support such enterprises seeking to serve markets in the Northeast. Indeed, our research has shown increasing activity in this market segment in the region. Controlled Environment Agriculture will be an increasingly important segment for Western New York and there is no reason an Erie County agri-business park should not be able a competitive location for such an enterprise.

“Transshipment” Processing: Western New York has the transportation infrastructure to enable it to bring in raw food products from outside the area, process them and then ship them on to markets in both the Northeast and Midwest. That is one of the factors that originally contributed to the success of the Port of Buffalo. Multi-modal transportation (e.g., water, rail and road) and access to major markets remain very attractive to such food processing firms. As indicated in the market analysis, such firms are likely to be smaller, niche operations rather than the types of large operations that Erie County has attracted in the past (e.g., ADM and General Mills). But they could be an important part of the tenant base for the agri-business park.

Canadian Food Processors: As indicated in the market analysis, Erie County can provide Canadian food processors with significant cost advantages in terms of power. For each of the market opportunities identified above, Erie County should consider pursuing Canadian firms that may be looking for lower cost locations to serve Northeastern markets. In Appendix 3, we have included a list of food processing firms in Southeastern Ontario as an illustration of the types of opportunities found there. Note also that several of these firms have existing operations in Western New York. Controlled Environment Agriculture may be a special opportunity in this regard, given the important of electric power to this segment and its current concentration in Canada.

Action Plan

Given the market opportunities identified in this study, the following action plan is proposed to enable the Erie County agri-business park to capture those opportunities.

Task 1. Seek an “Anchor Tenant” locally. As indicated earlier, Erie County appears to be a competitive location for an agri-business park. But as such, it is “in the game” for food processing prospects. There is no overwhelmingly compelling case to be made to a food processor that it should locate in the County’s proposed agri-business park. That can change as the park gains tenants and market exposure. In particular, marketing the park will become much easier once it has a major “anchor” tenant. Consequently the cornerstone of the recommended action plan is for the County to carefully cultivate such anchor tenants from within the region and even from within the County itself. As noted above, firms that are already in the County know that their business model works in Erie County—they have suppliers and support services in place along with ready access to market. At the same time, firms that have been in the County for more than ten years may be looking to upgrade facilities to improve their competitiveness. The Erie County agri-business park could provide such firms with a new facility that could also address limitation in their current location with regard to transportation access, the quantity and quality of electric supply, water supply, etc. Thus the first step in marketing the park may be to reach out to existing food processing enterprises in and around Erie County.

Dairy processors present one such opportunity. Indeed, Upstate Cooperative has asked to be kept informed on the development of the park and should be one of the first companies to be approached in discussing the park and the advantages it might provide for them and other firms in the region. As mentioned above, the Eden Valley Cooperative may represent another such opportunity in the organic/specialty produce sector.

Task 2. Make the case to other prospective tenants. Erie County has not done a good job of making its advantages apparent to site selectors and others. As the County is pursuing an anchor tenant it should also put together a “case statement” that expresses the advantages of an Erie County location for food processors. A central element of this message should be that Erie County is a sophisticated industrial economy located in a strong agricultural region. As indicated earlier, Erie County is the region’s hub for

producer services. It also has the infrastructure to support sophisticated processing operations and the transportation system that can support a variety of modes to get goods cheaply and easily to major markets. The County should assemble a package that addresses critical success factors for modern food processing. These include:

A labor pool with relevant skill sets and experience in an increasingly complex and capital-intensive manufacturing environment

Workforce training resources that can support the industry-specific needs of food manufacturers, which now include elevated needs for skills associated with high-speed automation, robotics, increasingly stringent and complex sanitation and cleanliness requirements, and energy-efficient production processes

A regulatory environment (at both the state and local level) that has experience in approvals required both to construct and operate food-processing facilities and the various utility requirements, emissions, and waste streams that are often associated with their operations

A local presence of suppliers, contractors, and technicians who can install, maintain, and maximize energy efficiency required for critical process utility systems and specialized production equipment, which is increasing in sophistication

Incentives geared to assist manufacturing by offering programs that mitigate infrastructure upgrade costs, reduction of taxes on real property and machinery and tools, and support for training. . . .

Easy transport access to markets including multi-modal options.

Flexible facilities to be able to respond to changes in market demand.

High quality and plentiful supplies of both water and electricity.²¹

Task 3. Pursue the opportunities in Controlled Environment Agriculture, Organic/Specialty Produce and Transshipment Processors. With an anchor tenant in place and a clear case statement of the advantages that Erie County's agri-business park provides, Erie County can then begin a broader marketing effort with site selectors, as well as establishing a regular presence at key industry trade shows. Appendix 4 contains a sample of trade shows. The precise shows to be included in this effort

²¹ Scott Kupperman, "Consumer Demographics and Preferences Drive Food Industry Location Decisions," *Area Development*, Q4, 2015, (emphases added).

should be developed in consultation with local representatives of the target industries for agri-business park.

Final Note: The Need for Administrative Capacity

As this analysis makes clear, there are opportunities for an agri-business park in Erie County. It should be equally clear that successfully marketing this facility will be a complex process. Developing the marketing message and appropriate materials will be important. But this effort will extend far beyond that. As indicated in the introduction, the success of this venture depends upon the creation of a strong food processing ecosystem in the County. In a sense the actual building of the park will be the crowning achievement in the creation of that ecosystem. If the pieces described in Task 2 are in place to support food processors, the success of the agri-business park is virtually assured.

Going forward, Erie County should ensure that it has the capacity to build the industry relationships that are required. This is particularly important for the effort to secure a local “anchor tenant.” But in addition, each of the opportunities identified here will require significant sustained attention. For example, realizing the potential for both organic/specialty produce and controlled environment agriculture will require working with firms within those industries as well as working with growers to ensure that, once operating, the enterprises will have access to an adequate supply of raw materials. Finally, as in any major economic development venture, demonstrating the availability of workforce and workforce development resources will be an ongoing concern. As the County proceeds with this venture, it will be important that it maintains the capacity to simultaneously address these diverse but critical concerns .

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Vaught, John, Senior Vice President, Transwestern, "Keep It Fresh: Re-evaluating the Food Manufacturing Supply Chain," Area Development, 2015

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Appendix 2: List of Stakeholder Contacts & Interviews

Stakeholders Contacted for this Study					
Name	Title (if available)	Organization	Called	Emailed	Interviewed
<u>Agricultural Advocacy/Assistance</u>					
Sharon Bachman, Megan Burley		Cornell Cooperative Extension Erie County	11/03,11/04	11/12	Yes
Cheryl Thayer		Cornell Cooperative Extension Erie County	11/03, 11/10	11/12	Yes
Jeff Kirby	Executive Director	New York Farm Bureau	11/03, 11/10	11/12	Directed us to local president
Jeffery Simons	President	Erie County Farm Bureau	2/24/16		
Tristan Zuber		Cornell Cooperative Extension Erie County		11/18	
Thomas Bjorkman	Researcher	Cornell Broccoli Project	12/11	11/18	Yes
Carl Moody	Dairy Specialist	Cornell Cooperative Extension Erie County	2/15		Yes
<u>Farms</u>					
George and Pat Castle		Castle Farms	11/03; 2/24/16		
Jerry Mammoser		Mammoser Farms	11/03; 2/24/16		
David Phillips		Phillips Family Farm	11/10; 2/24/16		
Marty Wendel		Wendel's Poultry Farm	11/10; 2/24/16		Declined
Bob and Jason Engel		Shamel Milling	11/10; 2/24/16		Yes (Jason Engle)
Lloyd Lamb		Lamb and Webster	11/10; 2/24/16		Yes
Ryan and Liz Donovan		Sweet Harvest Farm	11/10; 2/24/16		
Wayne and Gerald Aldinger		Aldinger's Farm	11/10; 2/24/16		
Carmen Vacco		Vacco Farms	11/10; 2/24/16		Wishes to be interviewed in person
Hans Boxler Jr		Boxler Dairy Farm			
Dan Gerhardt		GC Acres	11/10; 2/24/16		
Peter Gugino		Peter S. Gugino Farms			
<u>Dairy Processors</u>					
Jessica Ruth		Galbani Cheese (Formerly Sorrento)	11/11; 2/24/16		

Robert Denning		Perry's Ice Cream Co, Inc.	11/11, 12/11; 2/24/16		
Jeff Sokal		Steuben Foods Inc	11/10, 12/11	11/12	Declined
Tim Harner		Upstate Milk Cooperative	12/11		Directed to Ken Voelker
Jodi Smith		Upstate Milk Cooperative	12/11		Directed to Joe Duscher
Ken Voelker		Upstate Milk Cooperative	12/11		
Joe Duscher		Upstate Milk Cooperative	1/5		Yes
<u>Food Processors</u>					
David Wilczak	Manager	Eden Valley Growers-food hub	11/03, 11/10, 12/11		Yes
Norb and Lynn Gabel		Gabel's Maple Syrup	11/03, 11/13, 12/11; 2/24/16		
		Wegmans Markets	12/11		
Ed Gibbons		Deisderio's	12/11, 2/15/16; 2/24/16		
		Tyson Meat	11/10		
		Kraft Foods Global Inc	11/10		
Robert Drago		Goya Foods	11/10; 2/24/16		
		Conagra Foods			
Brian Paul		Trophy Foods	12/11		Declined
Mark Labine		Nutrablend Foods	12/11; 2/24/16		
Drew Blum	CEO	Allied Frozen Storage	2/15; 2/24/16		
Pasquale (Pat) Greco			12/11; 2/24/16		
<u>Bankers/Lenders</u>					
Nathan Rudgers	Farm Credit		11/10, 11/11		Yes
Hans Kunze- commercial lender	Steuben Trust (Bank)		11/10		
<u>Economic Developers</u>					
Steven W. Weathers, CEcD	Chief Executive	Erie County IDA		11/12, 12/11	Yes

	<i>Officer</i>				
Thomas Kucharski	President and CEO	Buffalo Niagara Enterprise	11/11, 12/11	11/12	Yes
Mary Grace Welch	Development Team	National Grid (electric, gas)	11/11	11/12	Yes
Jeff Janiszewski	Strategic Business Development	Empire State Development	11/11, 12/11	11/12	
Jane Thelen		Empire State Development			Yes
Kelly Tyler	Econ. Dev. & Community Outreach	NYS Energy Research and Development Authority	11/11, 12/11	11/12	Yes
Site Selectors/Realtors					
Michelle Comerford	Industrial and Supply Chain Practice Leader	Biggins Lacy Shapiro & Co.		11/12	
Jay A. Garner, CEcD, CCE, FM, HLM	President & Founder	Garner Economics, LLC		11/12	
Jerry Szatan	Owner	Szatan & Associates		11/12	
Gregg Wassmansdorf	Senior Managing Director	Newmark Grubb Knight Frank, Global Corporate Services		11/12	
Jeff Mengel		Plante and Moran		11/12	
John Morris		Cushman Wakefield		11/12	
Jamie Kishel		Cushman Wakefield		11/12	
Chris		Colliers International		11/12	
Art Rasmussen Jr.		CBRE		11/12	
Paul Tyler		Haskell		11/12	
Dennis J. Donovan	Partner	Wadley Donovan Gutshaw Consulting		11/12	Yes

Appendix 3: Sample of Food Processors in Southwestern Ontario

Sample of Food Processing Firms in Southwest Ontario									
COMPANY NAME	ADDRESS	SUITE #	CITY	PROVINCE	POSTAL CODE	ACTUAL EMPLOYEE SIZE	ACTUAL SALES VOLUME	NAICS Code	NAICS Description
JORIKI INC	885 SANDY BEACH RD		PICKERING	ON	L1W 3N6	150	\$56,700,000	31141102	FROZEN FRUIT JUICE & VEGETABLE MANUFACTURING
CHERRY LANE FROZEN FRUITS	4230 VICTORIA AVE		VINELAND STATION	ON	L0R 2E0	80	\$30,240,000	31141102	FROZEN FRUIT JUICE & VEGETABLE MANUFACTURING
REDSTONE FOODS LTD	2335 DUNWIN DR		MISSISSAUGA	ON	L5L 1A3	30	\$12,720,000	31141102	FROZEN FRUIT JUICE & VEGETABLE MANUFACTURING
ROMAN CHEESE PRODUCTS	7770 CANADIAN DR		NIAGARA FALLS	ON	L2E 6S5	25	\$7,975,000	31141102	FROZEN FRUIT JUICE & VEGETABLE MANUFACTURING
OKE PRODUCE 2004 LTD	111 COURT ST		OSHAWA	ON	L1H 4W5	9	\$3,402,000	31141102	FROZEN FRUIT JUICE & VEGETABLE MANUFACTURING
SUPREME PIEROGIES INC	1190 MID-WAY BLVD	10	MISSISSAUGA	ON	L5T 2B9	20	\$3,160,000	31141102	FROZEN FRUIT JUICE & VEGETABLE MANUFACTURING
BONDUELLE CANADA INC*	225 LOTHIAN AVE		STRATHROY	ON	N7G 4J1	300	\$95,700,000	31141202	FROZEN SPECIALTY FOOD MANUFACTURING
RICH PRODUCTS OF CANADA LTD*	12 HAGEY AVE		FORT ERIE	ON	L2A 1W3	280	\$89,320,000	31141202	FROZEN SPECIALTY FOOD MANUFACTURING
BONDUELLE CANADA INC*	1192 LACASSE BLVD		WINDSOR	ON	N8N 2C5	250	\$79,750,000	31141202	FROZEN SPECIALTY FOOD MANUFACTURING
BONDUELLE CANADA INC*	583278 HAMILTON RD		INGERSOLL	ON	N5C 3J7	200	\$63,800,000	31141202	FROZEN SPECIALTY FOOD MANUFACTURING
MOLINARO'S FINE ITALIAN FOODS	2345 STANFIELD RD	50	MISSISSAUGA	ON	L4Y 3Y3	160	\$51,040,000	31141202	FROZEN SPECIALTY FOOD MANUFACTURING
JANES FAMILY FOODS LTD	2160 7 HWY		CONCORD	ON	L4K 1W6	150	\$47,850,000	31141202	FROZEN SPECIALTY FOOD MANUFACTURING
D C FOOD PROCESSING	35 NORTHLAND RD		WATERLOO	ON	N2V 1Y8	70	\$22,330,000	31141202	FROZEN SPECIALTY FOOD MANUFACTURING
TRANSCONTINENTAL GOURMET FOODS	575 OSTER LANE		CONCORD	ON	L4K 2B9	50	\$15,950,000	31141202	FROZEN SPECIALTY FOOD MANUFACTURING
ALBA GRAECA	3171 LENWORTH DR		MISSISSAUGA	ON	L4X 2G6	38	\$12,122,000	31141202	FROZEN SPECIALTY FOOD MANUFACTURING
BONDUELLE CANADA INC	2420 MEADOWPINE BLVD	102	MISSISSAUGA	ON	L5N 6S2	38	\$12,122,000	31141202	FROZEN SPECIALTY FOOD MANUFACTURING
SUN-BRITE FOODS	1532 COUNTY ROAD 34		RUTHVEN	ON	N0P 2G0	150	\$69,600,000	31142101	FRUIT & VEGETABLE CANNING

Sample of Food Processing Firms in Southwest Ontario									
COMPANY NAME	ADDRESS	SUITE #	CITY	PROVINCE	POSTAL CODE	ACTUAL EMPLOYEE SIZE	ACTUAL SALES VOLUME	NAICS Code	NAICS Description
WEIL'S FOOD PROCESSING	483 ERIE ST N		WHEATLEY	ON	N0P 2P0	100	\$46,400,000	31142101	FRUIT & VEGETABLE CANNING
NATION WIDE CANNING LTD	324 COUNTY RD 34 E		COTTAM	ON	N0R 1B0	25	\$11,600,000	31142101	FRUIT & VEGETABLE CANNING
K D CANNERS INC	4444 EASTGATE PKY	9	MISSISSAUGA	ON	L4W 4T6	20	\$8,480,000	31142103	FRUIT & VEGETABLE CANNING
*Already has had a location/subsidiary in Western NYS. Source: Compiled by Fairweather Consulting from information provided by InfoUSA.									

Appendix 4: Examples of Food Processing Trade Shows

Natural Products Expo West

March 9-13, Anaheim, CA

Natural Products Expo West is where new products turn into record profits, relationship building and ROI is always high, and brand awareness builds momentum with each better business practice. Experience with over 3000 exhibits from over 1,800 different companies showcasing the newest products in natural and specialty foods, organic, health and beauty, natural living, supplements and pet products.

2016 Sweets & Snacks Expo

May 24-26, Chicago

Sponsored by the National Confectioners Association, the Expo is the candy & snacks industry's most successful, world class event and the only show that represents all of the major U.S. distribution channels of confectionery and snack products in one location.

International Dairy-Deli-Bakery Association 2016 Trade Show

June 5-7, Houston

The IDDBA conducts an annual trade show that attracts over 8,500 registrants, includes over 1800 exhibit booths, features a state-of-the-industry merchandising center, and offers top speakers such as business leaders, key policy makers, and legislative leaders. IDDBA's annual seminar & expo features the finest in dairy, deli and bakery: new products, new suppliers, new contacts, new (and old) buyers, and new ideas. This conference rotates geographically around the U.S.

United Fresh 2016

June 20-22, Chicago

Fresh food trends, new produce items and leading-edge processing technology for fruits and vegetables will be on display at the United Fresh Produce Association's annual convention and expo. The event is collocated at Chicago's McCormick Place Convention Center with three other industry events: FMI Connect, the International Floriculture Expo and the Global Cold Chain Expo, a new event designed for managers of refrigerated transportation and cold storage facilities. Registrants to United Fresh 2016 will have access to all four events. For an additional fee, attendees get an all-access pass for admittance to Fresh Foods: The Retail Revolution, an educational program that focuses on trends, innovations and examples of how fresh produce and other foods are impacting retail channels.

IFT Food Expo 2016

July 16-19, Chicago

Discover the industry's largest collection of food ingredients, equipment, processing, and packaging suppliers, all under one roof. This is where the latest global food trends — and the products and innovations designed to address them — are on display.

Natural Products Expo East
September 22-24, Baltimore

Natural Products Expo East brings together the natural, organic and healthy-lifestyle industry with thousands of products from passionate manufacturers, inspiring and practical education, and networking events where you will meet the contacts that will carry your business through its next stage of growth.

Private Label Show
November 16-18, Rosemont, IL

For more than 30 years, PLMA's annual trade show has been the industry event of the year, where retailers and wholesalers source for their private label programs. More than 1,300 companies from 40 countries will be exhibiting their products, including 25 international pavilions. Exhibitors range from small and medium-size companies to well-known national brand makers who also supply store brands.

Source: Food Processing, *2016 Events Guide*. Putnam Media, 2016.

Appendix J

Evans Industrial Park Preferred Site Analysis

- Section 1: Location Map, Existing Site Plan
- Section 2: Zoning Map
- Section 3: Environmental Review Maps
- Section 4: Utility Record Mapping
- Section 5: Conceptual Site Plans
- Section 6: Cost Estimates
- Section 7: Per Acre Cost Analysis

Section 1: Location Map and Existing Site Plan

Plotted By: Zach Anderson

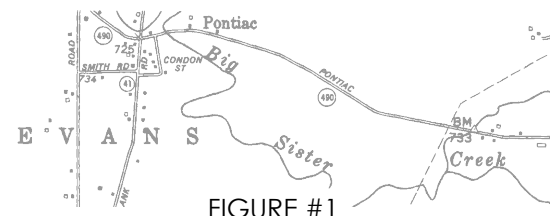
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Date last accessed: 3/11/2016 10:38 AM

Referenced Drawings: None
Drawing Name: J:\PROJECTS\Erie_Co\Ag Park FS\Design\ACAD\Civil\Site\EvansLocationMap.dwg



PROJECT LOCATION



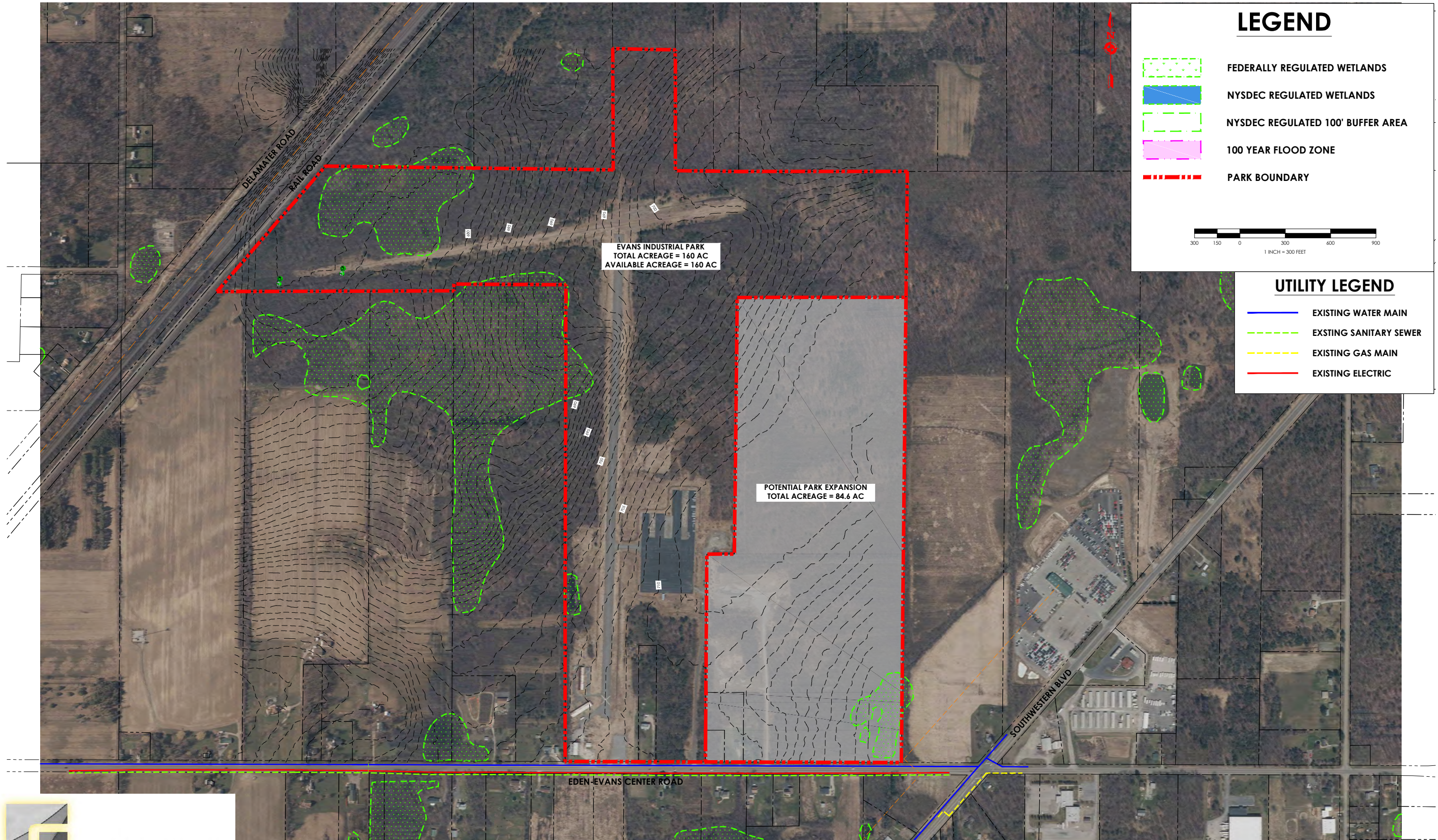
CLARK PATTERSON LEE
DESIGN PROFESSIONALS
205 ST. PAUL STREET, SUITE 500
ROCHESTER, NEW YORK 14604
TEL (800) 274-9000
FAX (585) 232-5836
www.clarkpatterson.com

DATE: 3/11/16
DRAWN: ZLA
CHECKED: ARK
SCALE: 1"=3,000'
PROJ. #: 13605.00

EVANS INDUSTRIAL PARK - LOCATION MAP

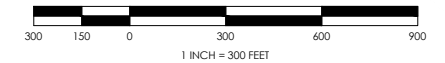
**ERIE COUNTY AGRIBUSINESS
PARK FEASIBILITY STUDY**

ERIE COUNTY DEPARTMENT OF ENVIRONMENT & PLANNING



LEGEND

- FEDERALLY REGULATED WETLANDS
- NYSDEC REGULATED WETLANDS
- NYSDEC REGULATED 100' BUFFER AREA
- 100 YEAR FLOOD ZONE
- PARK BOUNDARY



UTILITY LEGEND

- EXISTING WATER MAIN
- EXISTING SANITARY SEWER
- EXISTING GAS MAIN
- EXISTING ELECTRIC



Clark Patterson Lee
DESIGN PROFESSIONALS

ERIE COUNTY DEPARTMENT OF ENVIRONMENT & PLANNING

MARCH 2016

EXISTING SITE PLAN

Scale: 1"=300'

Section 2: Zoning Map



Legend:

Parcels (2014)

Zoning

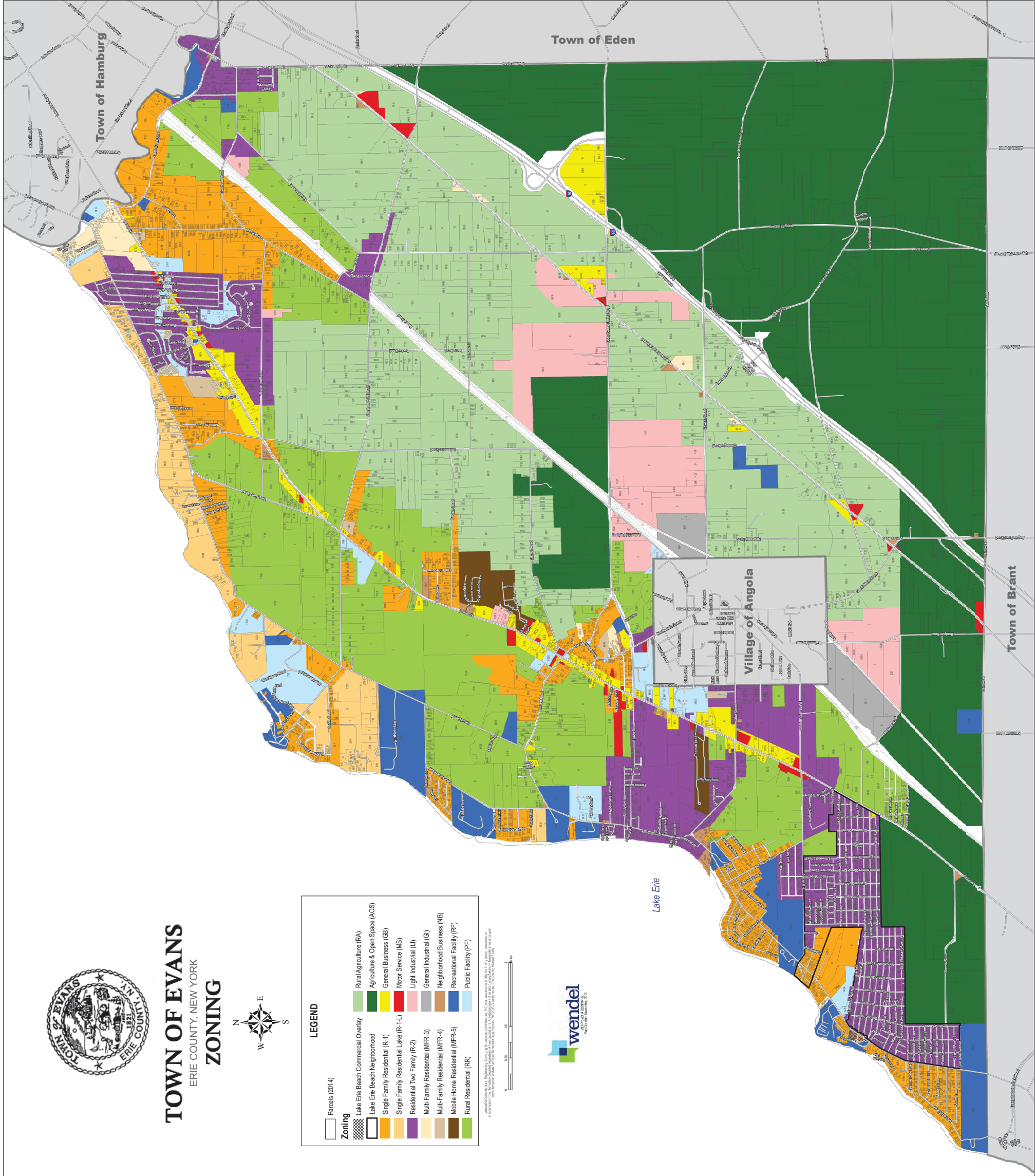
Land Use Categories:

- Rural Agriculture (RA)
- Agriculture & Open Space (AOS)
- General Business (GB)
- Motor Service (MS)
- Light Industrial (LI)
- General Industrial (GI)
- Neighborhood Business (NB)
- Recreational Facility (RF)
- Public Facility (PF)

Zoning Categories:

- Lake Erie Beach Commercial Overlay
- Lake Erie Beach Neighborhood
- Single Family Residential (R-1)
- Single Family Residential Lake (R-1-L)
- Residential Two Family (R-2)
- Multi-Family Residential (MFR-3)
- Multi-Family Residential (MFR-4)
- Mobile Home Residential (MFR-5)
- Rural Residential (RR)

Wendel WWD Architecture, Engineering, Surveying & Landscape Architecture, P.C. shall assume no liability for: 1. Any errors, omissions, or inaccuracies in the information provided regardless of how caused or; 2. Any decision not acted upon or not taken by the user in reliance upon any information or data furnished hereunder. Data Sources: NRS GIS Clearinghouse, Erie County, Town of Evans



Section 3: Environmental Review Maps



U.S. Fish and Wildlife Service

National Wetlands Inventory

Evans Industrial Park

Mar 10, 2016



Wetlands

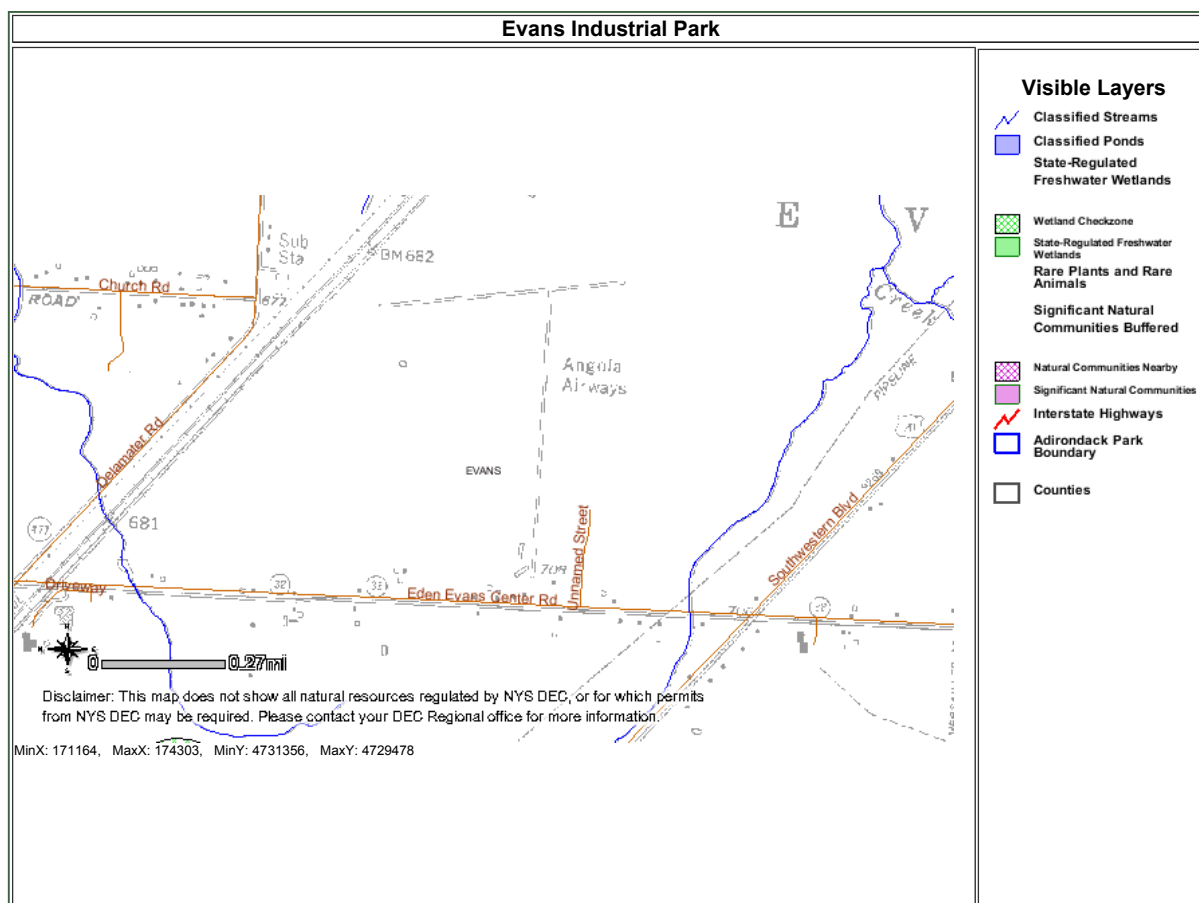
- Freshwater Emergent
- Freshwater Forested/Shrub
- Estuarine and Marine Deepwater
- Estuarine and Marine
- Freshwater Pond
- Lake
- Riverine
- Other

This map is for general reference only. The US Fish and Wildlife Service is not responsible for the accuracy or currentness of the base data shown on this map. All wetlands related data should be used in accordance with the layer metadata found on the Wetlands Mapper web site.

User Remarks:

[print page] [close window]

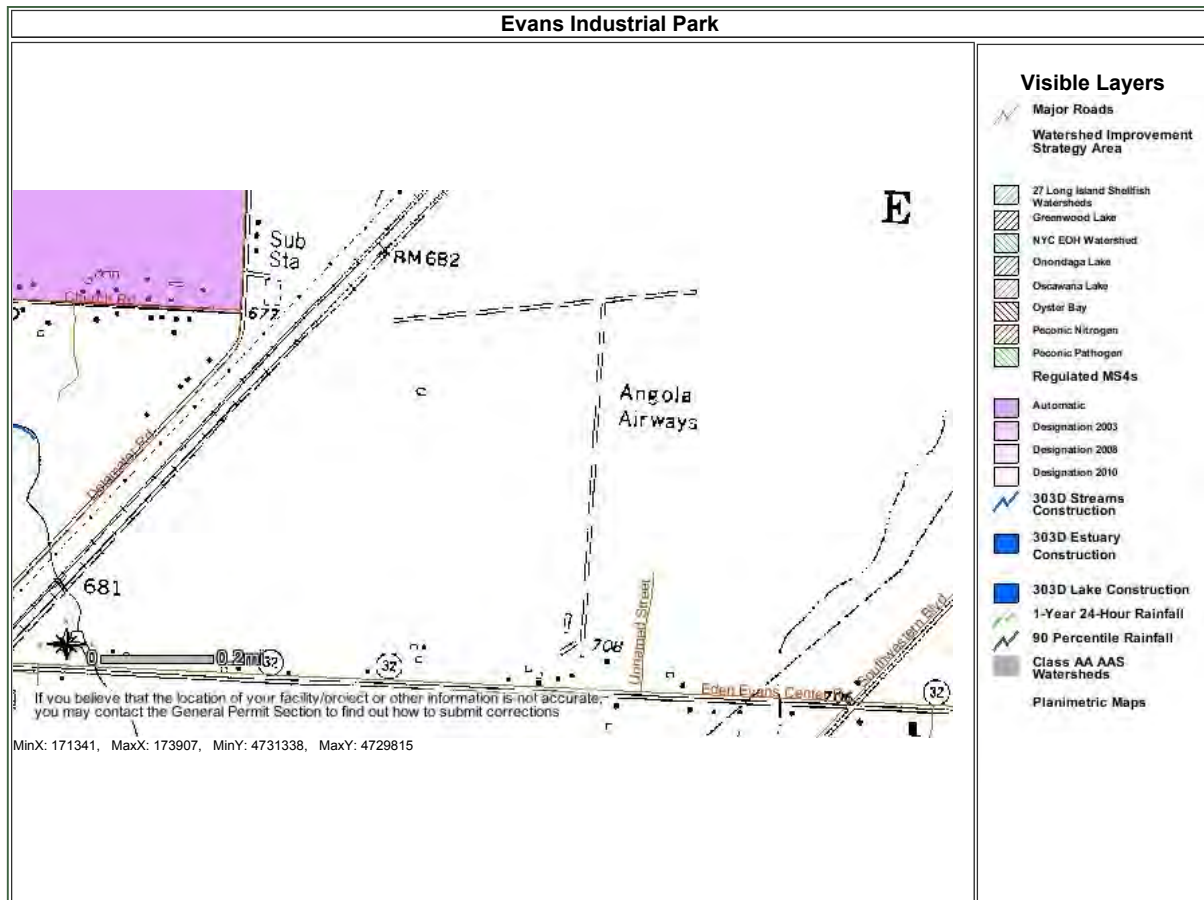
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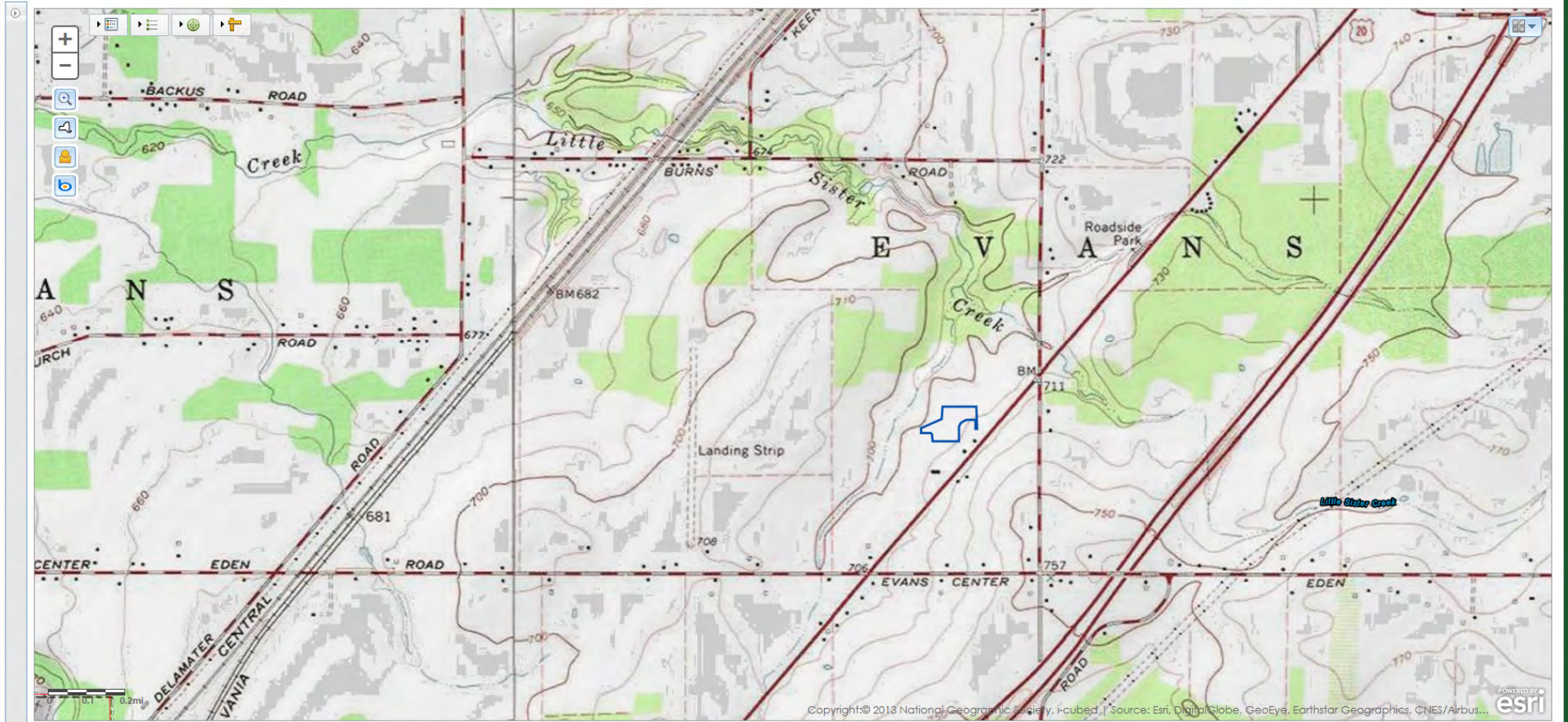


Disclaimer: This map was prepared by the New York State Department of Environmental Conservation using the most current data available. It is deemed accurate but is not guaranteed. NYS DEC is not responsible for any inaccuracies in the data and does not necessarily endorse any interpretations or products derived from the data.

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Please set your printer orientation to "Landscape".





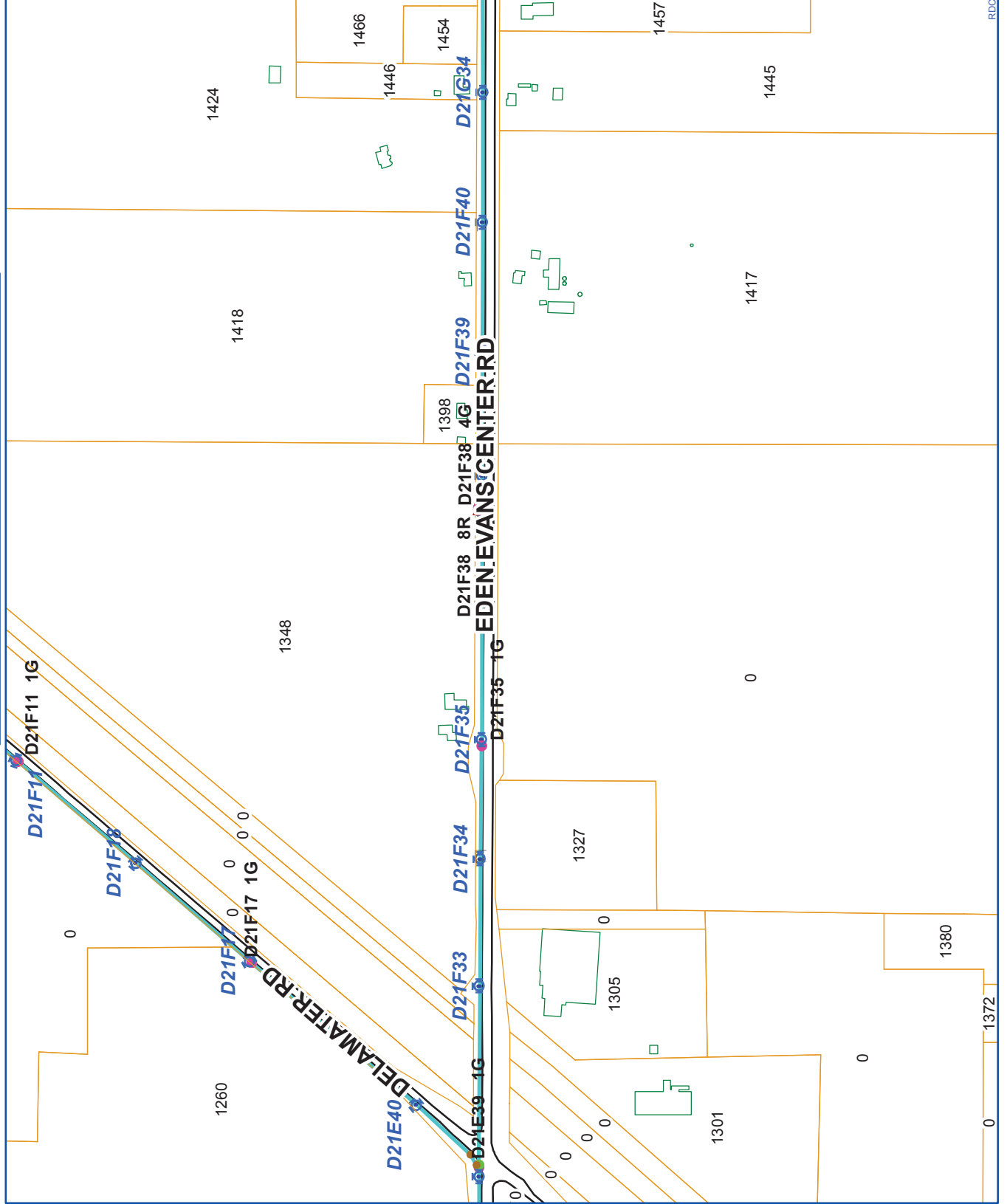
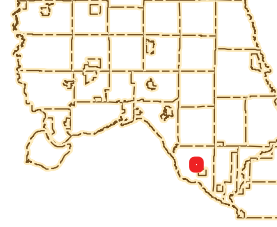
Section 4: Utility Record Mapping

Eden Evens Center Rd., Evans, NY



Legend:

- Parcels
- Mains**
 - Owned By Others
 - Active Main
 - Abandoned Main
 - Active Main Not Field Checked
 - Hydrant Stubs
 - Valved Off - Leak
 - Private Mains
 - Temporary Mains
 - Buildings



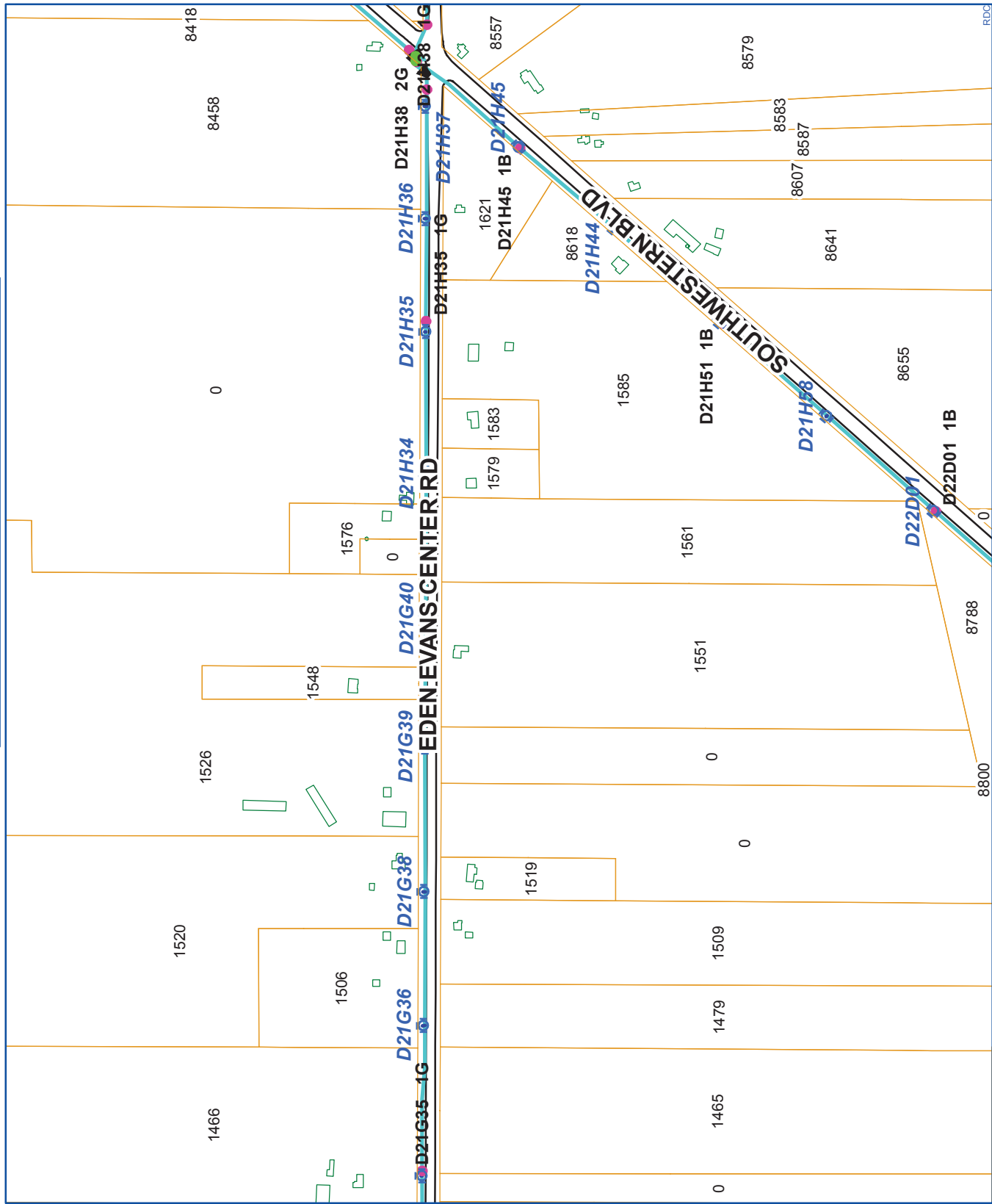
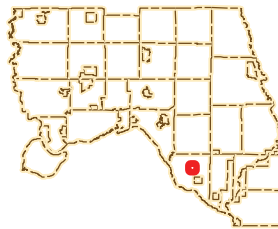
RDC

Eden Evens Center Rd., Evans, NY



Legend:

- Parcels
- Mains**
 - Owned By Others
 - Active Main
 - Abandoned Main
 - Active Main Not Field Checked
 - Hydrant Stubs
 - Valved Off - Leak
 - Private Mains
 - Temporary Mains
 - Buildings





ERIE COUNTY
WATER AUTHORITY
BUFFALO, NEW YORK

DR. D.K.C.

DR.

DATE: 7.30.15

DATE:

FIELD

OFFICE

TOWN OF EVANS
W.D. 5

D21-G39
DETAIL SHT. NO.

200500146
CURRENT PROJECT NO.

BLDG.
#1526



513.0' TO HYD. D21-G38

454.0' TO HYD. D21-G40

KENNEDY
K11

NM
78-1

10" C.I.P.

10" C.I.P.

10" C.I.P.

IG

4' PAVED SHOULDER

4' PAVED SHOULDER

24.0'

26.6'

24.8'

EDEN

EVANS

CENTER RD.

5' PAVED SHOULDER

5' PAVED SHOULDER

DWGSET1
EVTN-928-0501

D21-G39
DETAIL SHT. NO.

MASTER COPY



ERIE COUNTY
WATER AUTHORITY
BUFFALO, NEW YORK

DR. D.K.C.

DR.

DATE: 7.30.15

DATE:

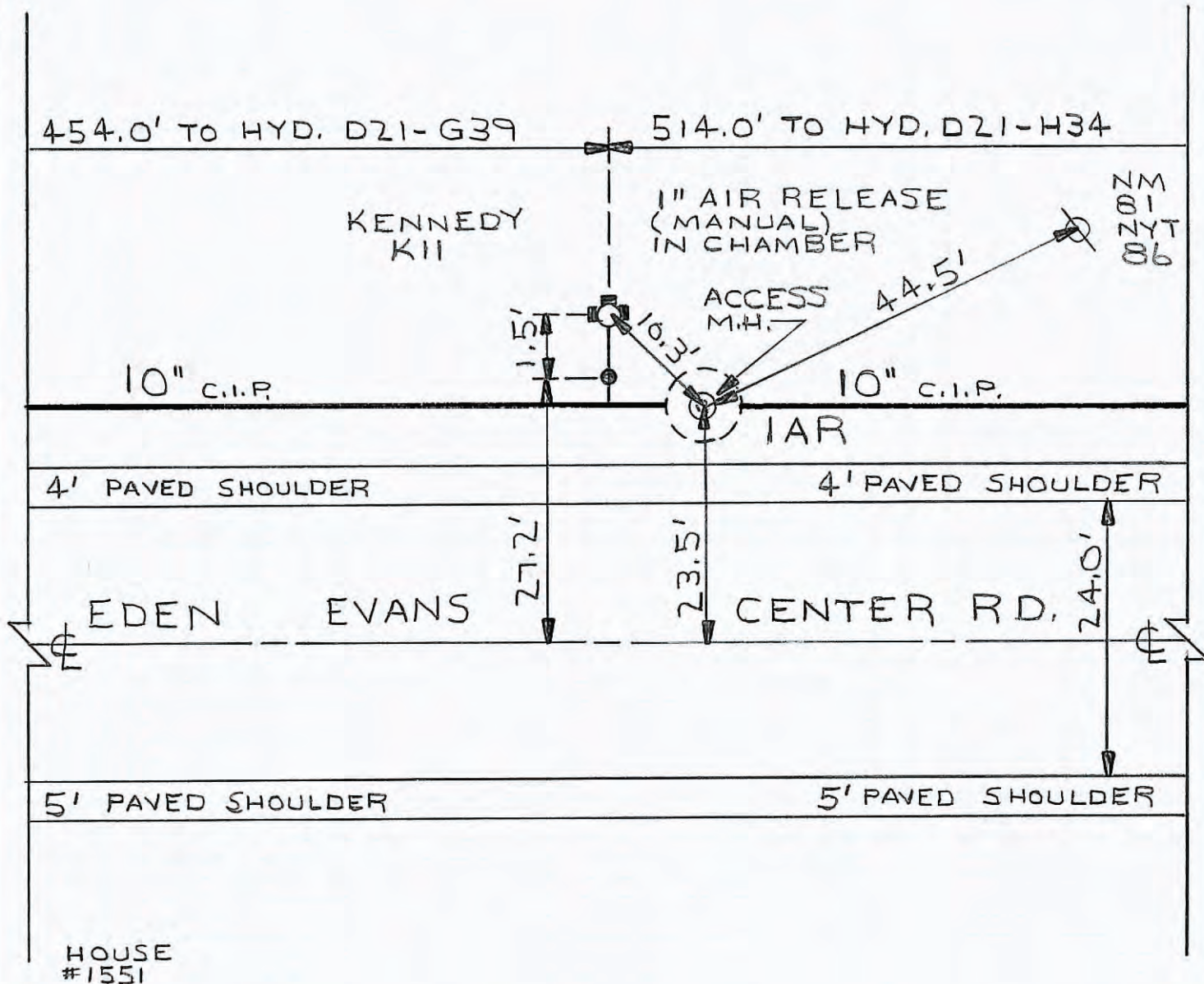
FIELD

OFFICE

TOWN OF EVANS
W.D. 5

D21-G40
DETAIL SHT. NO.

200500146
CURRENT PROJECT NO.



DWGSET1
DWGSET8
EVTN-928-0501

D21-G40
DETAIL SHT. NO.

MASTER COPY

RDCHydrant Inquiry RoutineCHI020-B

Hydrant Grid No: D21 - G39Hydrant X No.: -Active

Address.: 1526 EDEN EVANS CENTER RDSt Side: NLot:

Location: 6TH HYD W/O SOUTHWESTERN BLVDTown Code...: EVTN EVANS

Field Bk/Pg:

Dead End....: N

Water Dst: 345 EVANS WD #5

Fire Dist: 44020 ANGOLA FIRE PROTECTION

Valve Loc: 1.4' S/O HYD

26.6' N/O CL OF EDEN EVANS CENTER RD

Make Code: 62 KENNEDY STANDARD K11Drain Plugged: N Main Type: CI

Main Size: 10 Branch Size: 06Steamer:Size: 4.5 No: 1 Hose:Size: 2.5 No: 2

Comments.:

Pressure.: 75 lbs Date: 6/05/2014 Flow: 1,390 gpm Date: 12/18/2014

75 lbs6/05/2014gpm

Cur EC No: Replaced: 0Instl Dt: Grease: 6/05/2014

Pri EC No: Turn On.: Paint Dt: 6/27/2014 Thawed:

Billing Info:ECHD Approval Cmp Work Date:

C Account	Account Type	Qty	Description
60534625-5	L LEASE MANAGED	1.00	ACCOUNTING/PAYROLL DEPT

C: I=Account Inquiry

ENTER=Continue F3=Exit F5=Redisplay F6=MaintenanceF24=More Keys

RDCHydrant Inquiry RoutineCHI020-B

Hydrant Grid No: D21 - G40Hydrant X No.: -Active

Address.: OP 1551 EDEN EVANS CENTER RDSt Side: NLot:

Location: 5TH HYD W/O SOUTHWESTERN BLVDTown Code...: EVTN EVANS

Field Bk/Pg:

Dead End....: N

Water Dst: 345 EVANS WD #5

Fire Dist: 44020 ANGOLA FIRE PROTECTION

Valve Loc: 1.5' S/O HYD

27.2' N/O CL OF EDEN EVANS CENTER RD

Make Code: 62 KENNEDY STANDARD K11Drain Plugged: N Main Type: CI

Main Size: 10 Branch Size: 06Steamer:Size: 4.5 No: 1 Hose:Size: 2.5 No: 2

Comments.:

Pressure.: 75 lbs Date: 6/05/2014 Flow: 1,390 gpm Date: 12/18/2014

60 lbs4/17/2013gpm

Cur EC No: Replaced: 0Instl Dt: Grease: 6/05/2014

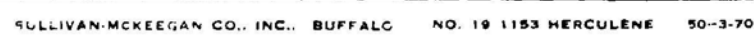
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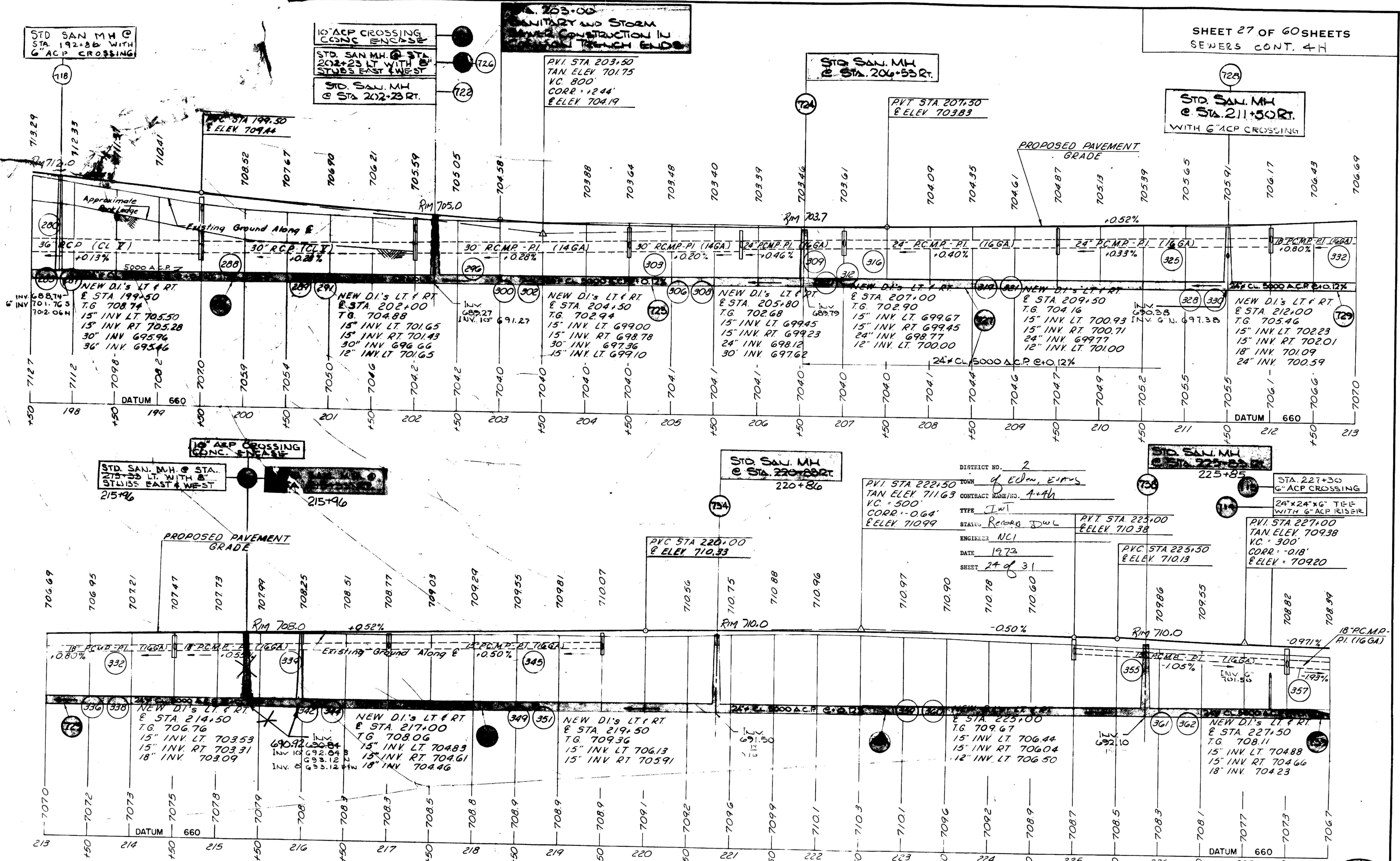
Billing Info: ECHD Approval Cmp Work Date:

C Account	Account Type	Qty	Description
60534625-5	L LEASE MANAGED	1.00	ACCOUNTING/PAYROLL DEPT

C: I=Account Inquiry

ENTER=Continue F3=Exit F5=Redisplay F6=MaintenanceF24=More Keys





PREPARED BY —
McFARLAND-JOHNSON-GIBBONS
ENGINEERS, INC.
BUFFALO, NEW YORK

Made By MG Tarbell
Traced By ED Hunter
Checked By MJ Damigo
Date Completed

PROFILE
SCALE: 1" = 50' HOR.
1" = 10' VERT.

DISTRICT NO. 2
TOWN of Eden, E. & W.
CONTRACT NAME/NO. A-4H
TYPE Int
STATUS Record DWL
ENGINEER NCI
DATE 1973
SHEET 24 of 31

PVI STA 222.50
TAN ELEV 711.63
VC = 500'
CORR = 0.64'
ELEV 710.99

PVI STA 225.00
TAN ELEV 710.38
VC = 300'
CORR = 0.18'
ELEV 709.20

PVI STA 227.00
TAN ELEV 709.38
VC = 300'
CORR = 0.18'
ELEV 709.20

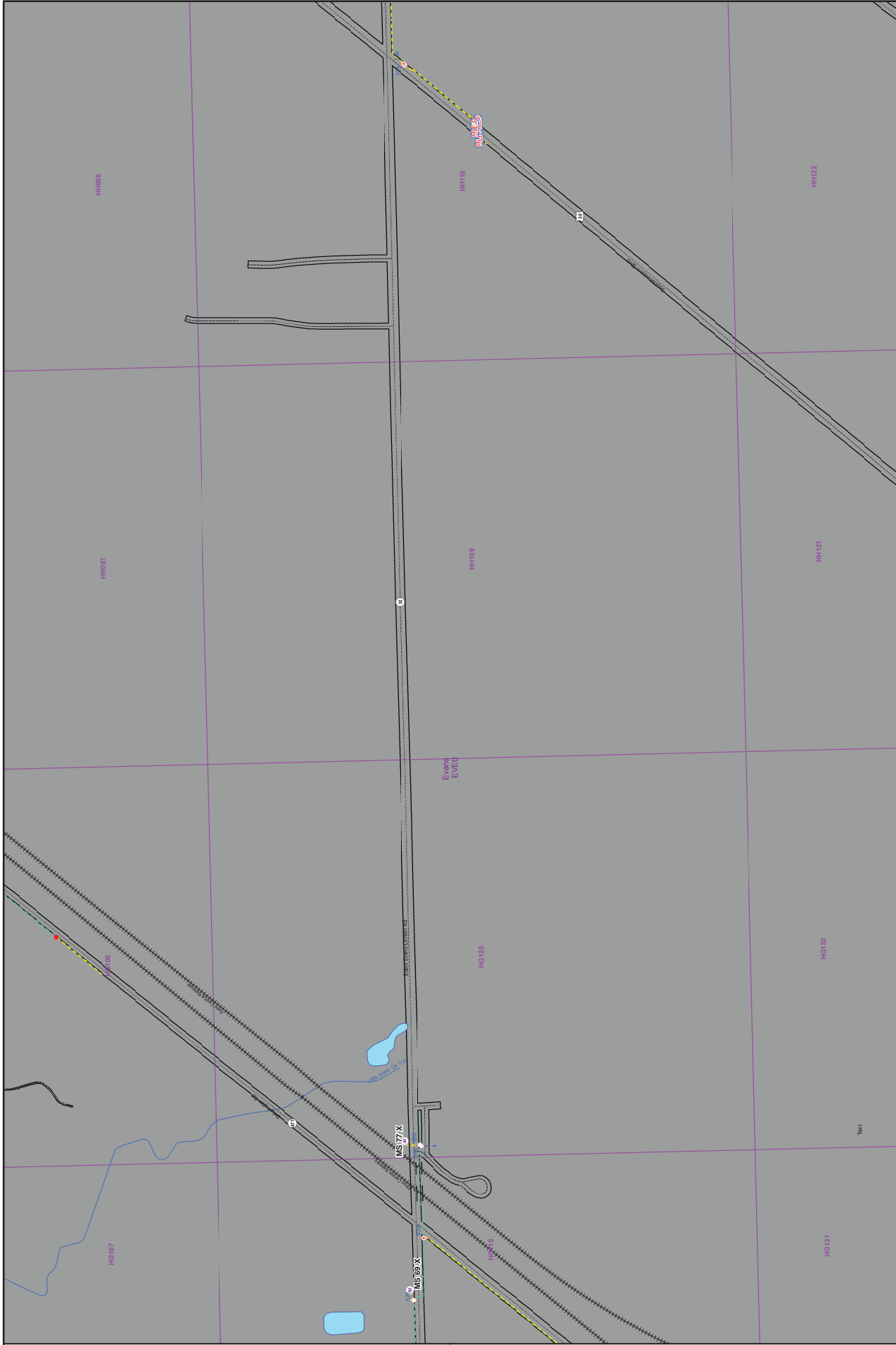
ERIE COUNTY DEPT. OF PUBLIC WORKS
DIVISION OF HIGHWAYS
45 CHURCH ST. BLDG. BUFFALO, N.Y.
EVANS CENTER-EDEN RD. CR 221
PROFILE STA. 197+50 TO STA. 228+00

AS BUILT
REVIEWED BY
UNION CONCRETE PAVING CO.
11-18-76

SHEET NO. 27
DATE 7-30-73
SCALE 1" = 50'

15143

- NFG Legend**
- Main Material**
- Bare Steel Main
 - Cast Iron Main
 - Coated Steel Main
 - Fiberglass Main
 - Plastic Main
 - PVC Main
 - Unknown
 - Wrought Iron Main
- Main Pressure Type**
- High, Direct Bury
 - Low, Direct Bury
 - Low, Inserted
 - Medium, Direct Bury
 - Medium, Inserted
- Valve**
- BALL
 - BURIED
 - BUTTERFLY
 - GATE
 - LUBE PLUG
 - ORBIT
 - OTHER
 - PLASTIC
 - STOP COCK
- Fitting**
- 4-Way Tee
 - Ell
 - End Cap
 - Main Break
 - Reducer
 - Tee
 - Transition
- Controlable Fitting**
- Controlable Fitting
 - Distance to CL
 - Distance to Inters. St
 - Distance off Curb



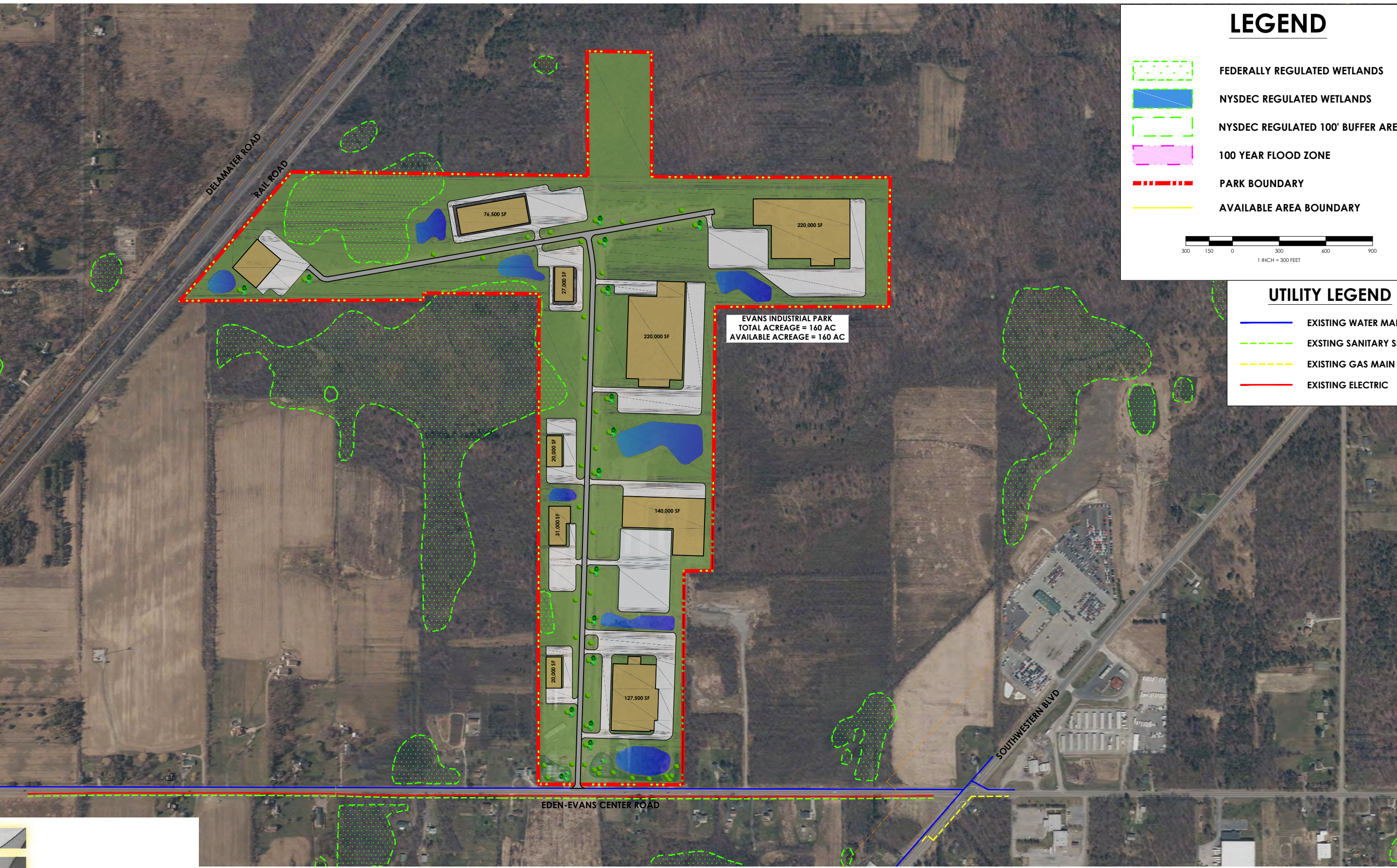
National Fuel

The location of gas facilities are approximate and should not be used for compiling engineering data without further field check for verification.



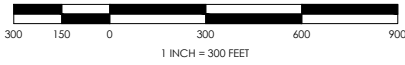
MultNet Street Data © 2006-2011 TomTom. All rights reserved.
Approximate Scale
0 375 750 1500 Feet
10/29/2015

Section 5: Conceptual Site Plans



LEGEND

- FEDERALLY REGULATED WETLANDS
- NYSDEC REGULATED WETLANDS
- NYSDEC REGULATED 100' BUFFER AREA
- 100 YEAR FLOOD ZONE
- PARK BOUNDARY
- AVAILABLE AREA BOUNDARY



UTILITY LEGEND

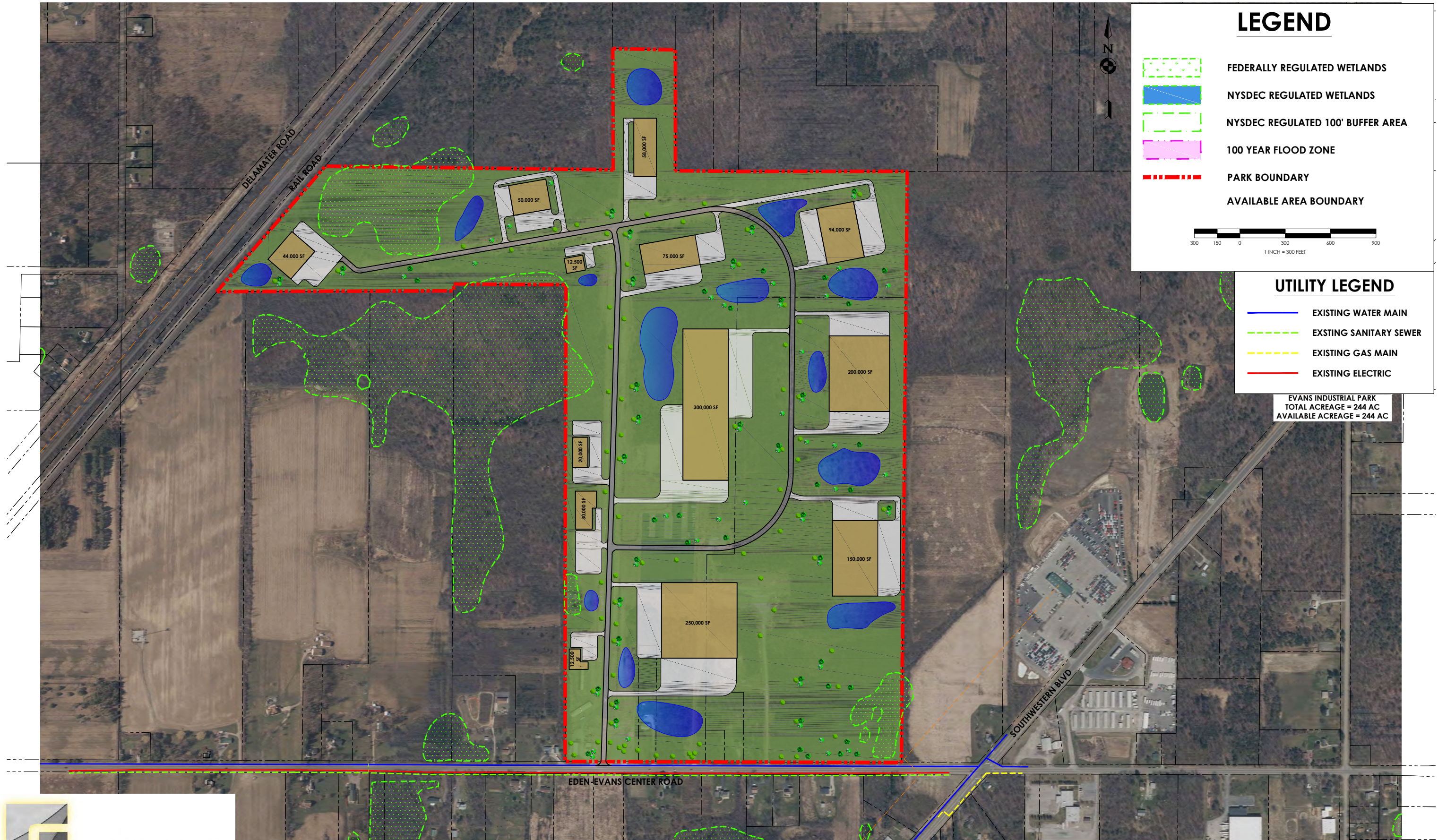
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- EXISTING SANITARY SEWER
- EXISTING GAS MAIN
- EXISTING ELECTRIC



Clark Patterson Lee
DESIGN PROFESSIONALS

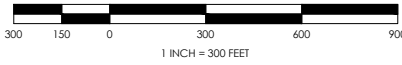
ERIE COUNTY
February 2016

EVANS INDUSTRIAL PARK CONCEPTUAL SITE PLAN - OPTION 1
Scale: 1"=300'



LEGEND

- FEDERALLY REGULATED WETLANDS
- NYSDEC REGULATED WETLANDS
- NYSDEC REGULATED 100' BUFFER AREA
- 100 YEAR FLOOD ZONE
- PARK BOUNDARY
- AVAILABLE AREA BOUNDARY



UTILITY LEGEND

- EXISTING WATER MAIN
- EXISTING SANITARY SEWER
- EXISTING GAS MAIN
- EXISTING ELECTRIC

EVANS INDUSTRIAL PARK
TOTAL ACREAGE = 244 AC
AVAILABLE ACREAGE = 244 AC



Clark Patterson Lee
DESIGN PROFESSIONALS

ERIE COUNTY DEPARTMENT OF ENVIRONMENT & PLANNING

February 2016

EVANS INDUSTRIAL PARK CONCEPTUAL SITE PLAN - OPTION 2

Scale: 1"=300'

Section 6: Cost Estimates

ERIE COUNTY DEPARTMENT OF ENVIRONMENT & PLANNING
AGRIBUSINESS FEASIBILITY
EVANS INDUSTRIAL PARK
MARCH 2016

Concept Option #1

ITEM	DESCRIPTION	ESTIMATED QUANTITY	UNIT	ESTIMATED UNIT COST	TOTAL ESTIMATED COST
On-Site Infrastructure Improvements					
1	General Site Grading	1	LS	\$ 150,000.00	\$ 150,000
2	Roadway Improvements ¹	6,300	LF	\$ 150.00	\$ 945,000
3	Roadway Construction ²	350	LF	\$ 275.00	\$ 96,250
4	Furnish and Install New 12" PVC Water Main	7,300	LF	\$ 70.00	\$ 511,000
5	Furnish and Install New 12"SDR-21 PVC Gravity Sanitary Sewer Main	6,300	LF	\$ 125.00	\$ 787,500
6	Electric + Transmission line planning/engineering, right of way/easement acquisition (By Utility)	6,300	LF	\$ 50.00	\$ 315,000
7	Natural Gas Main planning/engineering, right of way/easement acquisition (by Utility)	6,300	LF	\$ 50.00	\$ 315,000
8	Telephone and Communications (By Utility)	6,300	LF	\$ 30.00	\$ 189,000
On-Site Infrastructure Subtotal =					\$ 3,308,750
Fire Protection Improvements					
9	Furnish and Install Ground Mounted Water Storage Tank	1	LS	\$ 1,000,000.00	\$ 1,000,000
10	Furnish and Install Fire Flow Pump	1	LS	\$ 250,000.00	\$ 250,000
Fire Protection Improvements Subtotal =					\$ 1,250,000
ESTIMATED SUBTOTAL =					\$ 4,558,750
CONTINGENCY (10%) =					\$ 455,875
LEGAL, ENGINEERING & ADMINISTRATION (25%) =					\$ 1,139,688
ESTIMATED TOTAL CAPITAL COST =					\$ 6,154,000

Notes:

1. The existing runway is assumed to be in adequate condition to accept truck traffic. Roadway Improvements consist of storm, center median, striping, extension to Evans Center Road, etc.
2. Roadway Construction includes runway extension to Evans Center Road.

ERIE COUNTY DEPARTMENT OF ENVIRONMENT & PLANNING
AGRIBUSINESS FEASIBILITY
EVANS INDUSTRIAL PARK
MARCH 2016

Concept Option #2

ITEM	DESCRIPTION	ESTIMATED QUANTITY	UNIT	ESTIMATED UNIT COST	TOTAL ESTIMATED COST
On-Site Infrastructure Improvements					
1	General Site Grading	1	LS	\$ 250,000.00	\$ 250,000
2	Roadway Improvements ¹	6,300	LF	\$ 150.00	\$ 945,000
3	Roadway Construction ²	3,950	LF	\$ 275.00	\$ 1,086,250
4	Furnish and Install New 12" PVC Water Main	9,700	LF	\$ 70.00	\$ 679,000
5	Furnish and Install New 12"SDR-21 PVC Gravity Sanitary Sewer Main	9,700	LF	\$ 125.00	\$ 1,212,500
6	Electric + Transmission line planning/engineering, right of way/easement acquisition (By Utility)	9,700	LF	\$ 50.00	\$ 485,000
7	Natural Gas Main planning/engineering, right of way/easement acquisition (by Utility)	9,700	LF	\$ 50.00	\$ 485,000
8	Telephone and Communications (By Utility)	9,700	LF	\$ 30.00	\$ 291,000
On-Site Infrastructure Subtotal =					\$ 5,433,750
Fire Protection Improvements					
9	Furnish and Install Ground Mounted Water Storage Tank ²	1	LS	\$ 1,000,000.00	\$ 1,000,000
10	Furnish and Install Fire Flow Pump ³	1	LS	\$ 250,000.00	\$ 250,000
Fire Protection Improvements Subtotal =					\$ 1,250,000
ESTIMATED SUBTOTAL =					\$ 6,683,750
CONTINGENCY (10%) =					\$ 668,375
LEGAL, ENGINEERING & ADMINISTRATION (25%) =					\$ 1,670,938
ESTIMATED TOTAL CAPITAL COST =					\$ 9,023,000

Notes:

1. The existing runway is assumed to be in adequate condition to accept truck traffic. Roadway Improvements consist of storm, center median, striping, new top course asphalt, etc.
2. Roadway Construction includes runway extension to Evans Center Road and the proposed loop.

Section 7: Per Acre Cost Analysis

EVANS INDUSTRIAL PARK - COST PER ACRE ANALYSIS
MARCH 2016

Generic Environmental Impact Statement (GEIS)

ITEM	DESCRIPTION	ESTIMATED QUANTITY	UNIT	ESTIMATED UNIT COST	ESTIMATED TOTAL COST
1	GEIS	1	EA	\$ 300,000.00	\$ 300,000
Total GEIS Cost:					\$ 300,000

Infrastructure Construction and Land Acquisition

ITEM	DESCRIPTION	ESTIMATED QUANTITY	UNIT	ESTIMATED UNIT COST	ESTIMATED TOTAL COST
2	Roadway and Utilities	1	EA	\$ 4,558,750	\$ 4,558,750
Infrastructure Construction Subtotal					\$ 4,558,750
3	Construction Contingency	10	%	\$ -	\$ 455,875
4	Legal, Administration, Engineering	25	%	\$ -	\$ 1,139,688
Infrastructure Construction Total					\$ 6,155,000
5	Land Acquisition (County Purchase)	158.00	acres	\$ 7,500.00	\$ 1,185,000
Total Infrastructure Cost:					\$ 7,340,000

Total Estimated Project Cost: **\$ 7,640,000**
Total Acreage: 158.00
Price Per Acre (County cost): **\$ 49,000**

Less Anticipated Grants:
Potential Grant (TBD - example only)

\$ (2,000,000)

\$ (2,000,000)
158.00

Net reduction per acre: **\$ (12,658)**

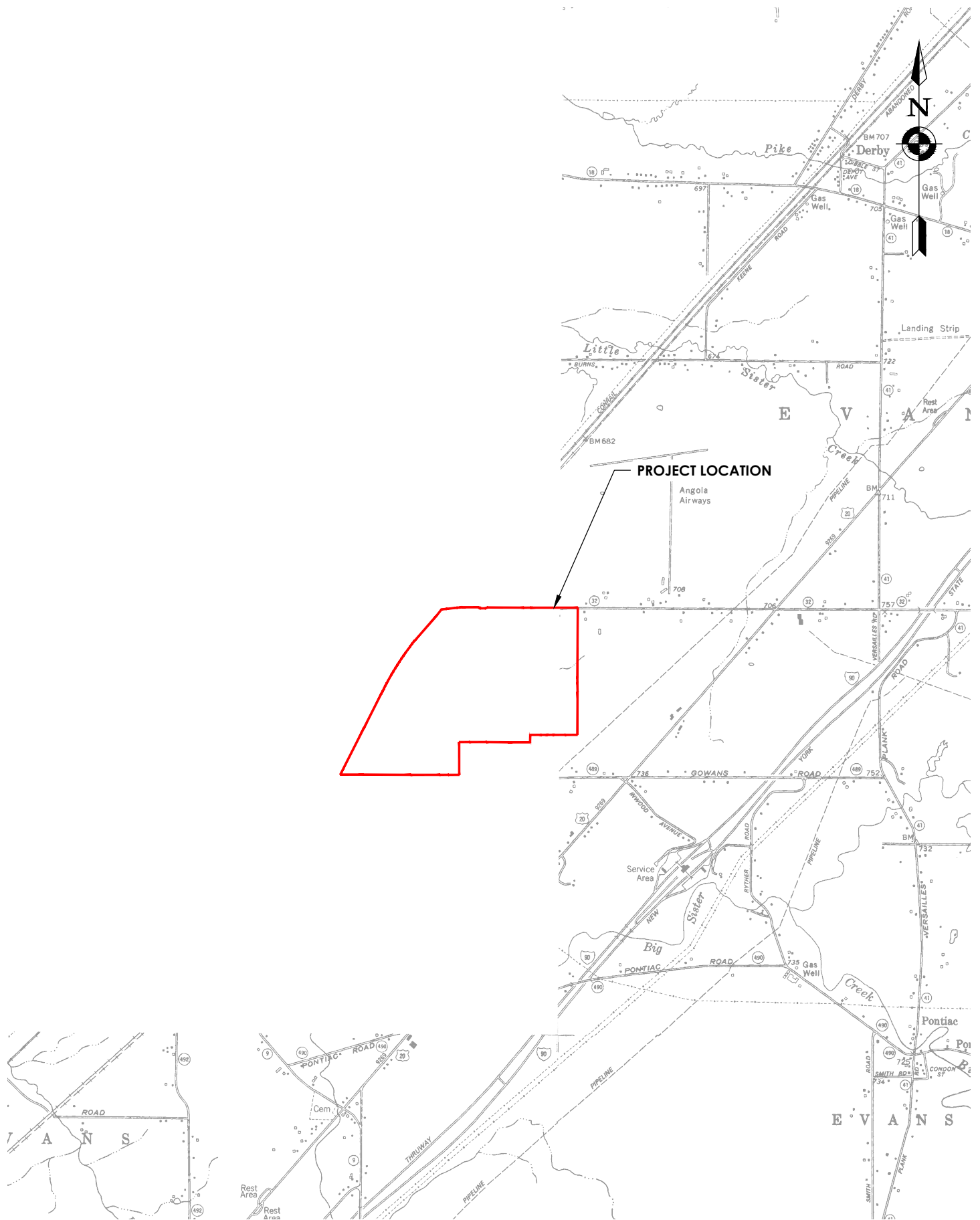
Note: Gas and electric costs have been included in the total cost per acre for simplicity. Cost sharing options may be available depending on the utility and businesses within the Park.

Appendix K

Evans Gowans Road Site Preferred Site Analysis

- Section 1: Location Map, Existing Site Plan
- Section 2: Zoning Map
- Section 3: Environmental Review Maps
- Section 4: Utility Record Mapping
- Section 5: Conceptual Site Plans
- Section 6: Cost Estimates
- Section 7: Per Acre Cost Analysis

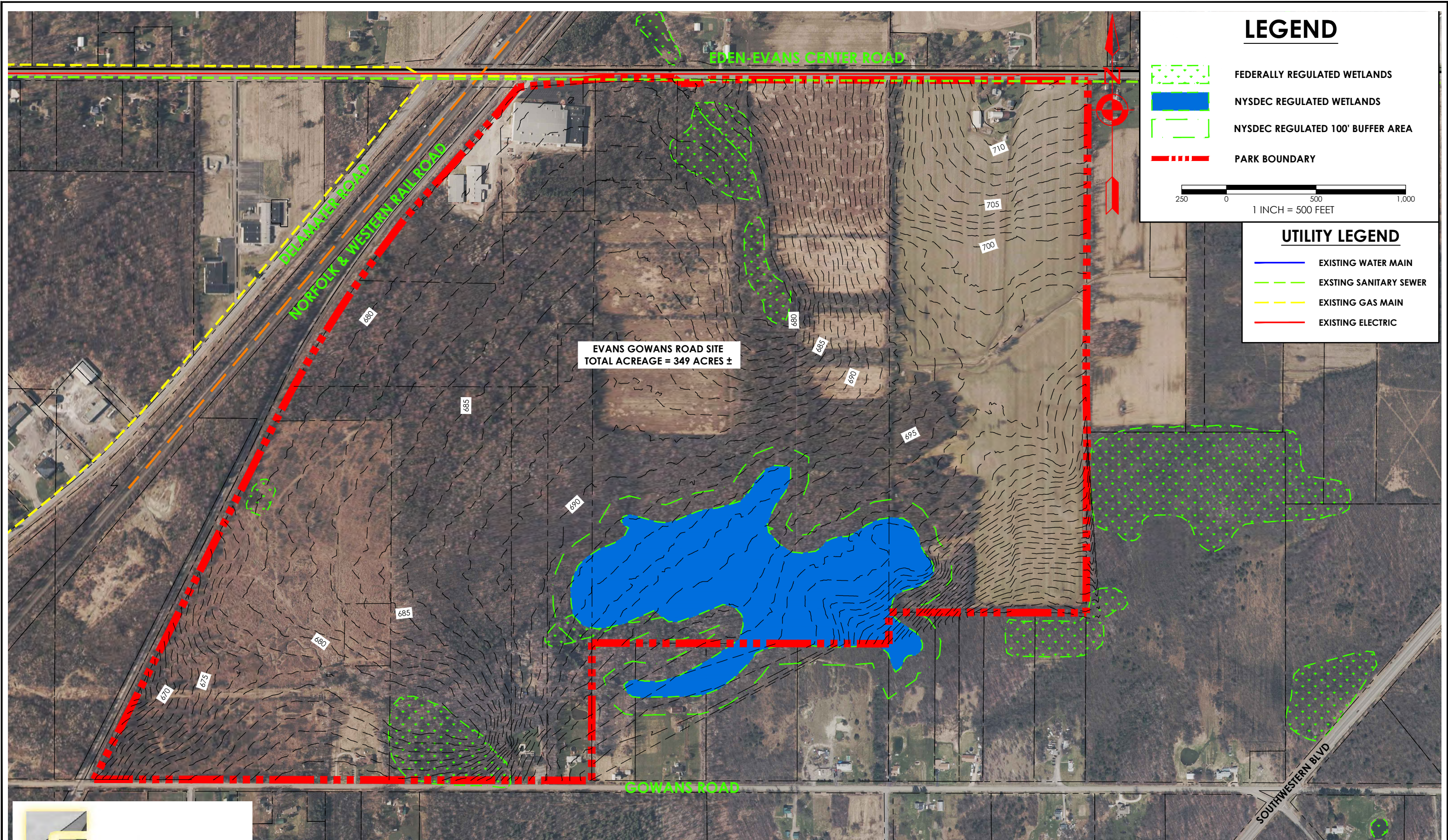
Section 1: Location Map and Existing Site Plan



CLARK PATTERSON LEE
DESIGN PROFESSIONALS
205 ST. PAUL STREET, SUITE 500
ROCHESTER, NEW YORK 14604
TEL (800) 274-9000
FAX (585) 232-5836
www.clarkpatterson.com

DATE: 3/18/16
DRAWN: ZLA
CHECKED: ARK
SCALE: 1"=3,000'
PROJ. #: 13605.00

EVANS GOWANS RD - LOCATION MAP
ERIE COUNTY AGRIBUSINESS
PARK FEASIBILITY STUDY
ERIE COUNTY DEPARTMENT OF ENVIRONMENT & PLANNING



LEGEND

- FEDERALLY REGULATED WETLANDS
- NYSDEC REGULATED WETLANDS
- NYSDEC REGULATED 100' BUFFER AREA
- PARK BOUNDARY

250 0 500 1,000
1 INCH = 500 FEET

UTILITY LEGEND

- EXISTING WATER MAIN
- EXISTING SANITARY SEWER
- EXISTING GAS MAIN
- EXISTING ELECTRIC



Clark Patterson Lee
DESIGN PROFESSIONALS

ERIE COUNTY DEPARTMENT OF ENVIRONMENT & PLANNING

MARCH 2016

EVANS GOWANS ROAD SITE

Scale: 1"=500'

Section 2: Zoning Map



Parcels (2014)

Zoning

Lake Erie Beach Commercial Overlay

Lake Erie Beach Neighborhood

Single Family Residential (R-1)

Single Family Residential Lake (R-1-L)

Single Family Residential (R-2)

Residential Two Family (R-2)

Multi-Family Residential (MFR-3)

Multi-Family Residential (MFR-4)

Mobile Home Residential (MFR-5)

Rural Residential (RR)

Rural Agriculture (RA)

Agriculture & Open Space (AOS)

General Business (GB)

Motor Service (MS)

Light Industrial (LI)

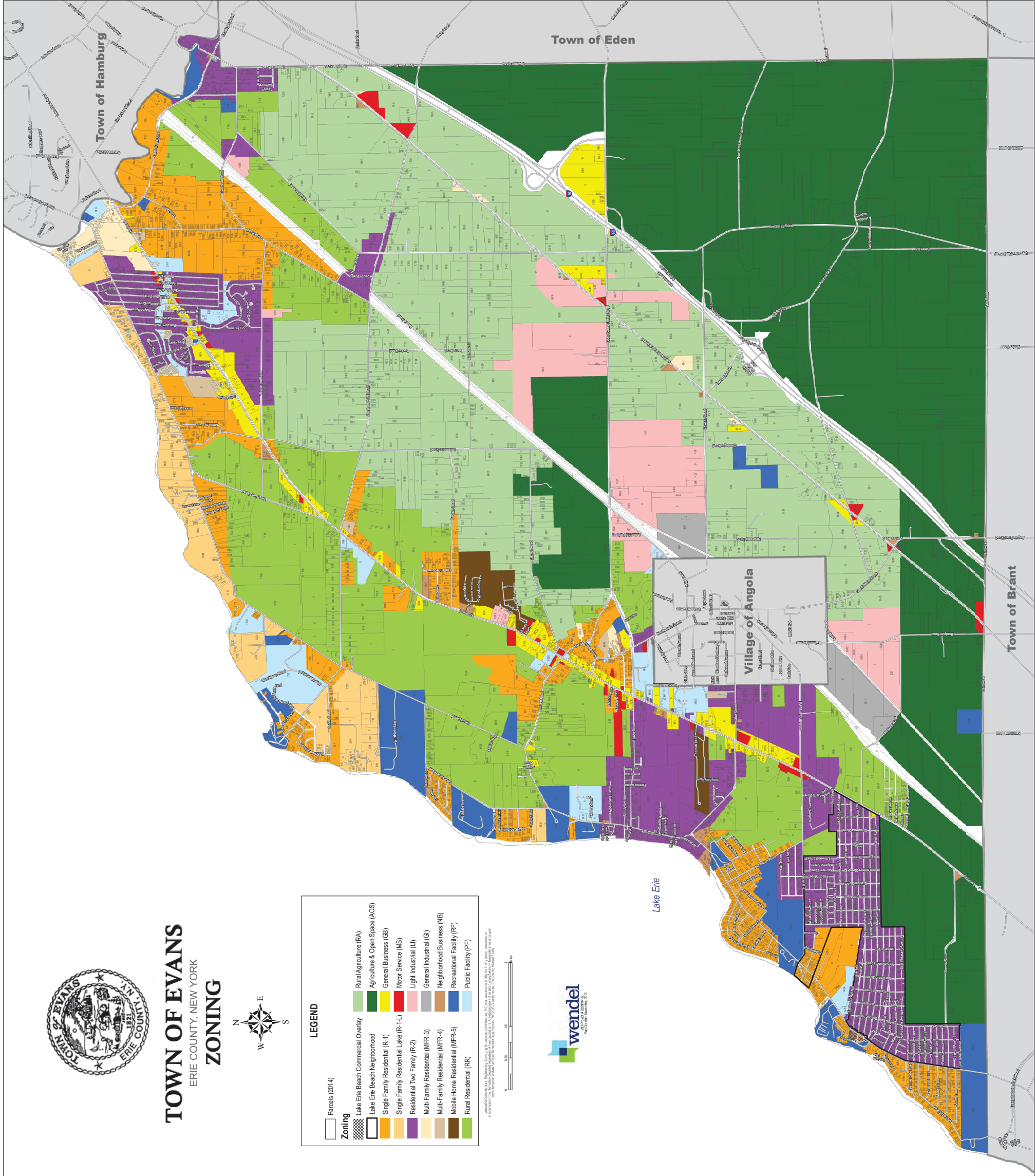
General Industrial (GI)

Neighborhood Business (NB)

Recreational Facility (RF)

Public Facility (PF)

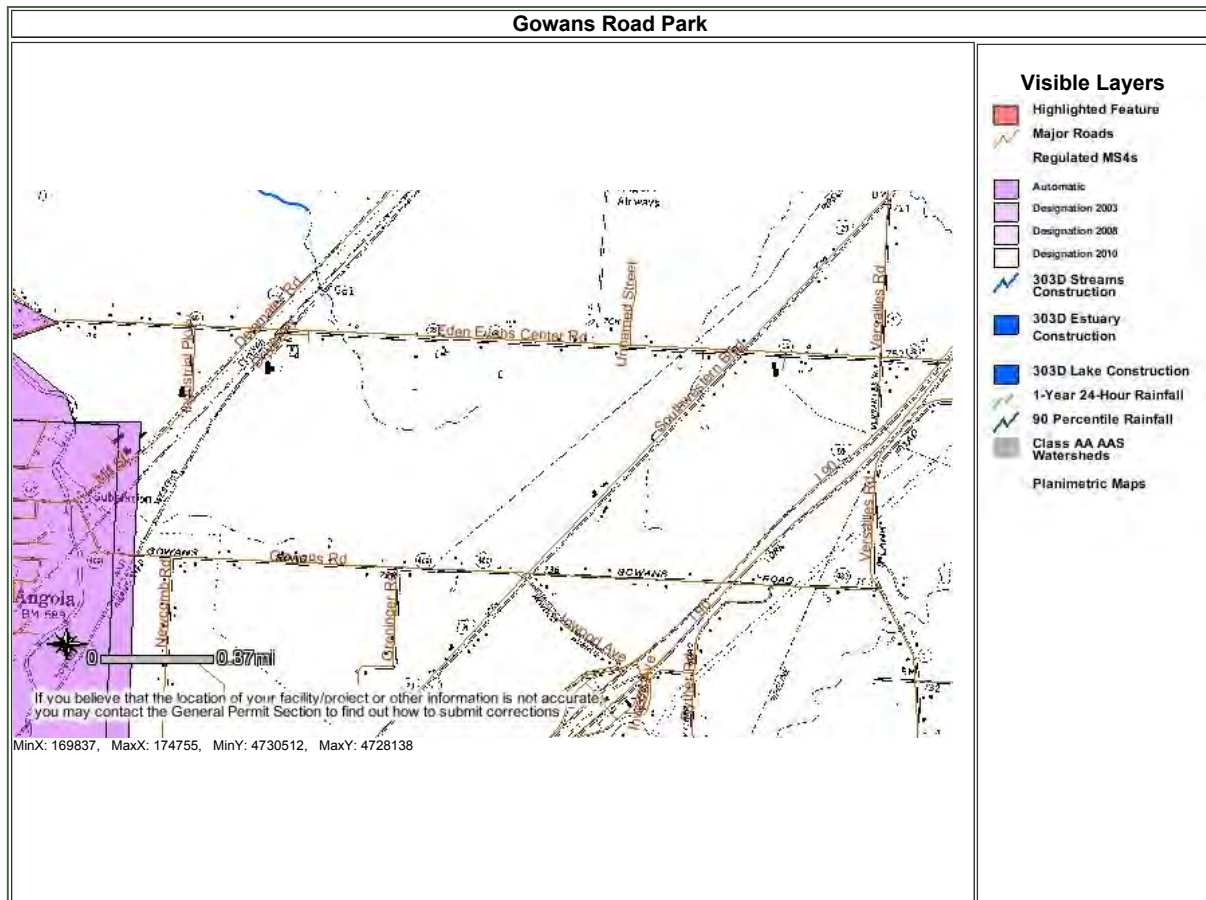
Wendel WWD Architecture, Engineering, Surveying & Landscape Architecture, P.C. shall assume no liability for: 1. Any errors, omissions, or inaccuracies in the information provided regardless of how caused or; 2. Any decision not acted upon or not taken by the user in reliance upon any information or data furnished hereunder. Data Sources: NRS GIS Clearinghouse, Erie County, Town of Evans



Section 3: Environmental Review Maps

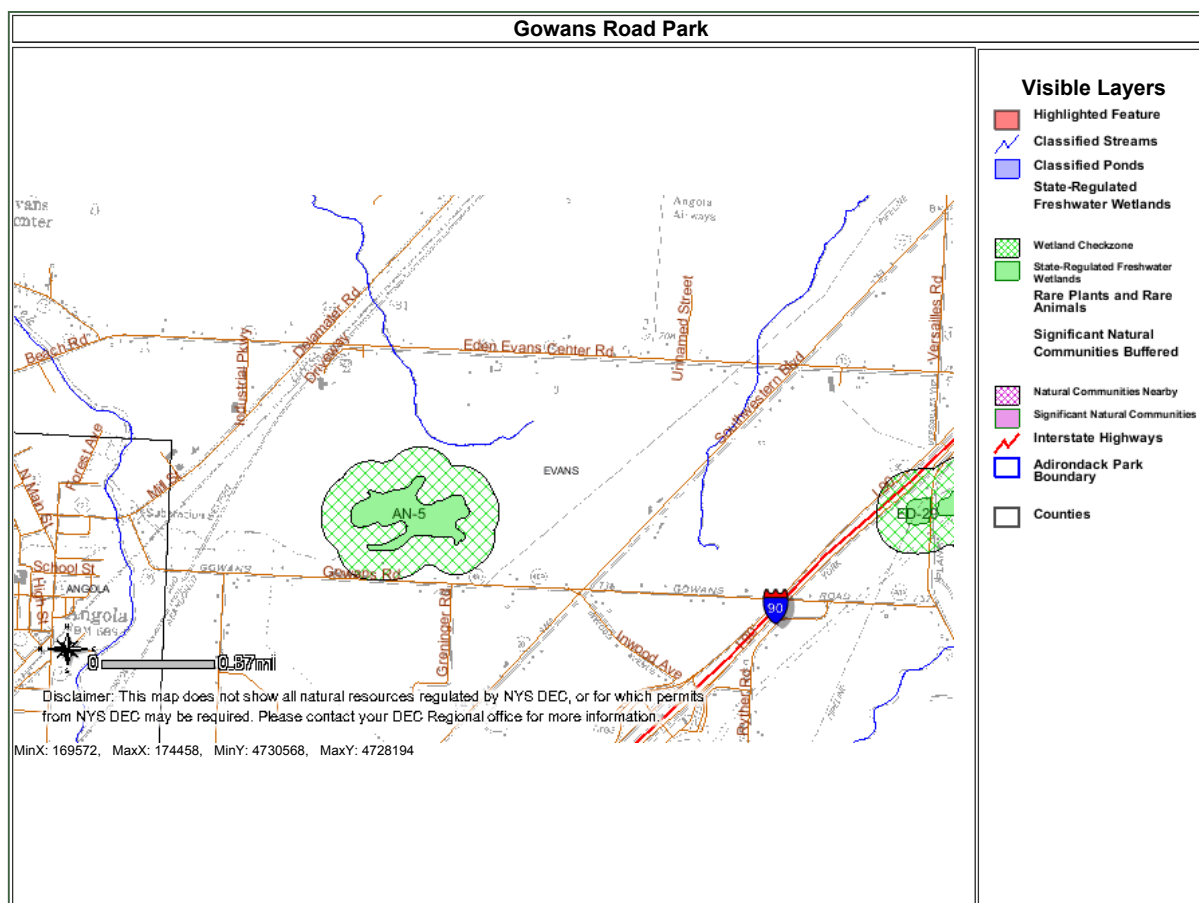
[\[print page\]](#) [\[close window\]](#)

Please set your printer orientation to "Landscape".

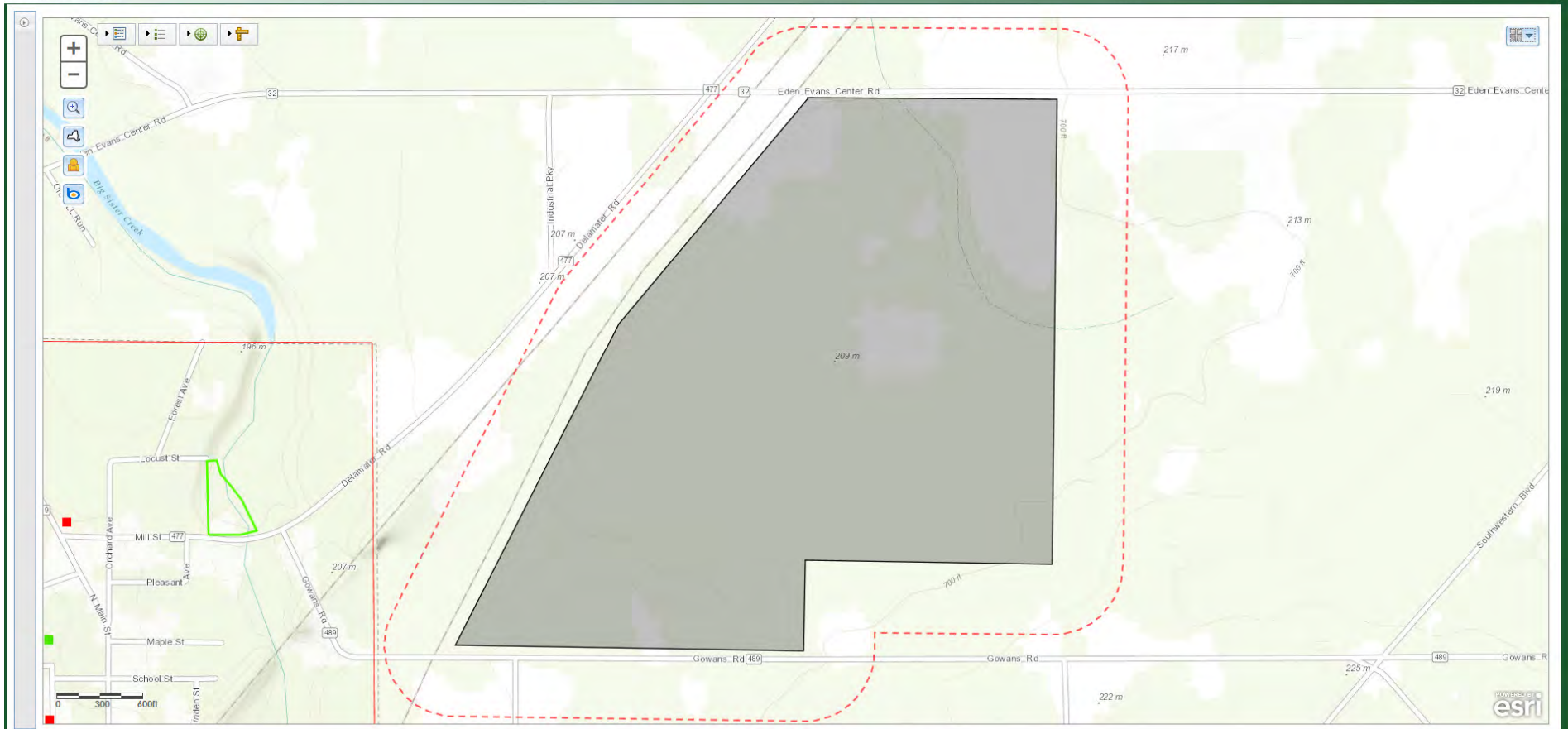


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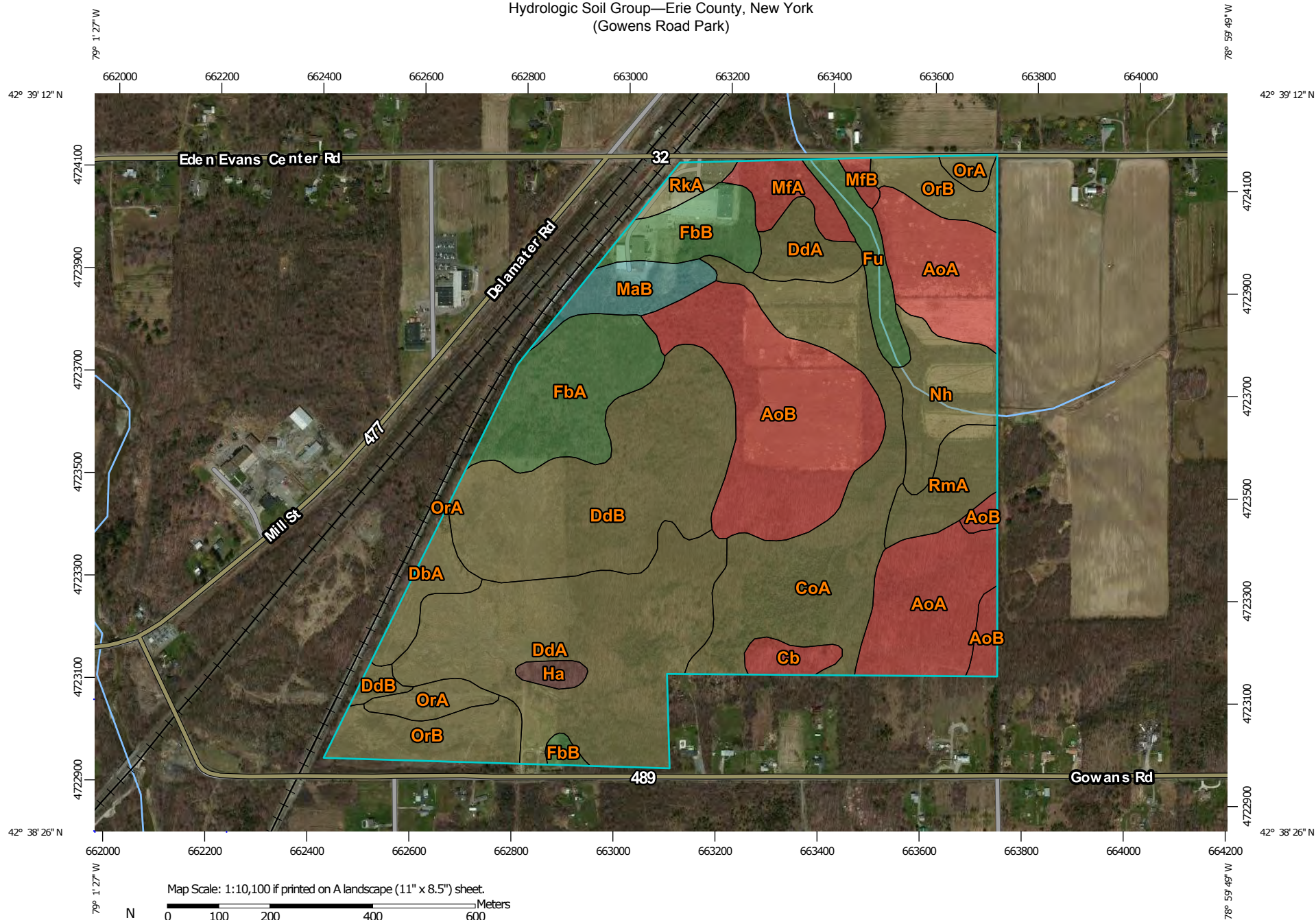
Please set your printer orientation to "Landscape".



Disclaimer: This map was prepared by the New York State Department of Environmental Conservation using the most current data available. It is deemed accurate but is not guaranteed. NYS DEC is not responsible for any inaccuracies in the data and does not necessarily endorse any interpretations or products derived from the data.



Hydrologic Soil Group—Erie County, New York (Gowens Road Park)



**Natural Resources
Conservation Service**

Web Soil Survey
National Cooperative Soil Survey

4/21/2016
Page 1 of 4

MAP LEGEND

Area of Interest (AOI)









 Area of Interest (AOI)

Soils

Soil Rating Polygons





 A
 A/D
 B
 B/D
 C
 C/D
 D
 Not rated or not available

Soil Rating Lines

 A
 A/D
 B
 B/D
 C
 C/D
 D
 Not rated or not available

Soil Rating Points






 A
 A/D
 B
 B/D

 C
 C/D
 D
 Not rated or not available

Water Features

 Streams and Canals

Transportation

 Rails
 Interstate Highways
 US Routes
 Major Roads
 Local Roads

Background

 Aerial Photography

MAP INFORMATION

The soil surveys that comprise your AOI were mapped at 1:15,800.

Please rely on the bar scale on each map sheet for map measurements.

Source of Map: Natural Resources Conservation Service
 Web Soil Survey URL: <http://websoilsurvey.nrcs.usda.gov>
 Coordinate System: Web Mercator (EPSG:3857)

Maps from the Web Soil Survey are based on the Web Mercator projection, which preserves direction and shape but distorts distance and area. A projection that preserves area, such as the Albers equal-area conic projection, should be used if more accurate calculations of distance or area are required.

This product is generated from the USDA-NRCS certified data as of the version date(s) listed below.

Soil Survey Area: Erie County, New York
 Survey Area Data: Version 14, Sep 23, 2015

Soil map units are labeled (as space allows) for map scales 1:50,000 or larger.

Date(s) aerial images were photographed: Data not available.

The orthophoto or other base map on which the soil lines were compiled and digitized probably differs from the background imagery displayed on these maps. As a result, some minor shifting of map unit boundaries may be evident.

Hydrologic Soil Group

Hydrologic Soil Group— Summary by Map Unit — Erie County, New York (NY029)				
Map unit symbol	Map unit name	Rating	Acres in AOI	Percent of AOI
AoA	Angola silt loam, 0 to 3 percent slopes	D	28.0	10.4%
AoB	Angola silt loam, 3 to 8 percent slopes	D	33.0	12.3%
Cb	Canadice silt loam, channery till substratum	D	2.7	1.0%
CoA	Churchville silt loam, 0 to 3 percent slopes	C/D	32.5	12.1%
DbA	Darien silt loam, 0 to 3 percent slopes	C/D	4.6	1.7%
DdA	Derb silt loam, 0 to 3 percent slopes	C/D	46.6	17.3%
DdB	Derb silt loam, 3 to 8 percent slopes	C/D	37.7	14.0%
FbA	Farnham channery silt loam, 0 to 3 percent slopes	A/D	17.4	6.5%
FbB	Farnham channery silt loam, 3 to 8 percent slopes	A/D	9.0	3.3%
Fu	Fluvaquents and Udifluvents, frequently flooded	A/D	5.6	2.1%
Ha	Halsey silt loam	B/D	1.5	0.6%
MaB	Manlius channery silt loam, 3 to 8 percent slopes	C	6.0	2.2%
MfA	Marilla channery silt loam, 0 to 3 percent slopes	D	4.8	1.8%
MfB	Marilla channery silt loam, 3 to 8 percent slopes	D	1.0	0.4%
Nh	Niagara silt loam, till substratum	C/D	10.3	3.8%
OrA	Orpark silt loam, 0 to 3 percent slopes	C/D	4.6	1.7%
OrB	Orpark silt loam, 3 to 8 percent slopes	C/D	13.8	5.1%
RkA	Rhinebeck gravelly loam, 0 to 3 percent slopes	C/D	2.4	0.9%

Hydrologic Soil Group— Summary by Map Unit — Erie County, New York (NY029)				
Map unit symbol	Map unit name	Rating	Acres in AOI	Percent of AOI
RmA	Rhinebeck silty clay loam, stratified substratum, 0 to 3 percentslopes	C/D	7.1	2.6%
Totals for Area of Interest			268.7	100.0%

Description

Hydrologic soil groups are based on estimates of runoff potential. Soils are assigned to one of four groups according to the rate of water infiltration when the soils are not protected by vegetation, are thoroughly wet, and receive precipitation from long-duration storms.

The soils in the United States are assigned to four groups (A, B, C, and D) and three dual classes (A/D, B/D, and C/D). The groups are defined as follows:

Group A. Soils having a high infiltration rate (low runoff potential) when thoroughly wet. These consist mainly of deep, well drained to excessively drained sands or gravelly sands. These soils have a high rate of water transmission.

Group B. Soils having a moderate infiltration rate when thoroughly wet. These consist chiefly of moderately deep or deep, moderately well drained or well drained soils that have moderately fine texture to moderately coarse texture. These soils have a moderate rate of water transmission.

Group C. Soils having a slow infiltration rate when thoroughly wet. These consist chiefly of soils having a layer that impedes the downward movement of water or soils of moderately fine texture or fine texture. These soils have a slow rate of water transmission.

Group D. Soils having a very slow infiltration rate (high runoff potential) when thoroughly wet. These consist chiefly of clays that have a high shrink-swell potential, soils that have a high water table, soils that have a claypan or clay layer at or near the surface, and soils that are shallow over nearly impervious material. These soils have a very slow rate of water transmission.

If a soil is assigned to a dual hydrologic group (A/D, B/D, or C/D), the first letter is for drained areas and the second is for undrained areas. Only the soils that in their natural condition are in group D are assigned to dual classes.

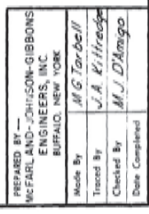
Rating Options

Aggregation Method: Dominant Condition

Component Percent Cutoff: None Specified

Tie-break Rule: Higher

Section 4: Utility Record Mapping



NOTE
FOR ALL CONTROL POINTS, REFER TO
SHEET 33 FOR THEM.

AS BUILTS
REVIEWED BY
[Signature]
UNION CONCRETE & CONSTRUCTION CORP.
[Signature]

AMERICAN CONCRETE INSTITUTE
FEB 1968

Not to Scale
DL @ STA 125+1183
N 966, 655.905
E 391, 090.158

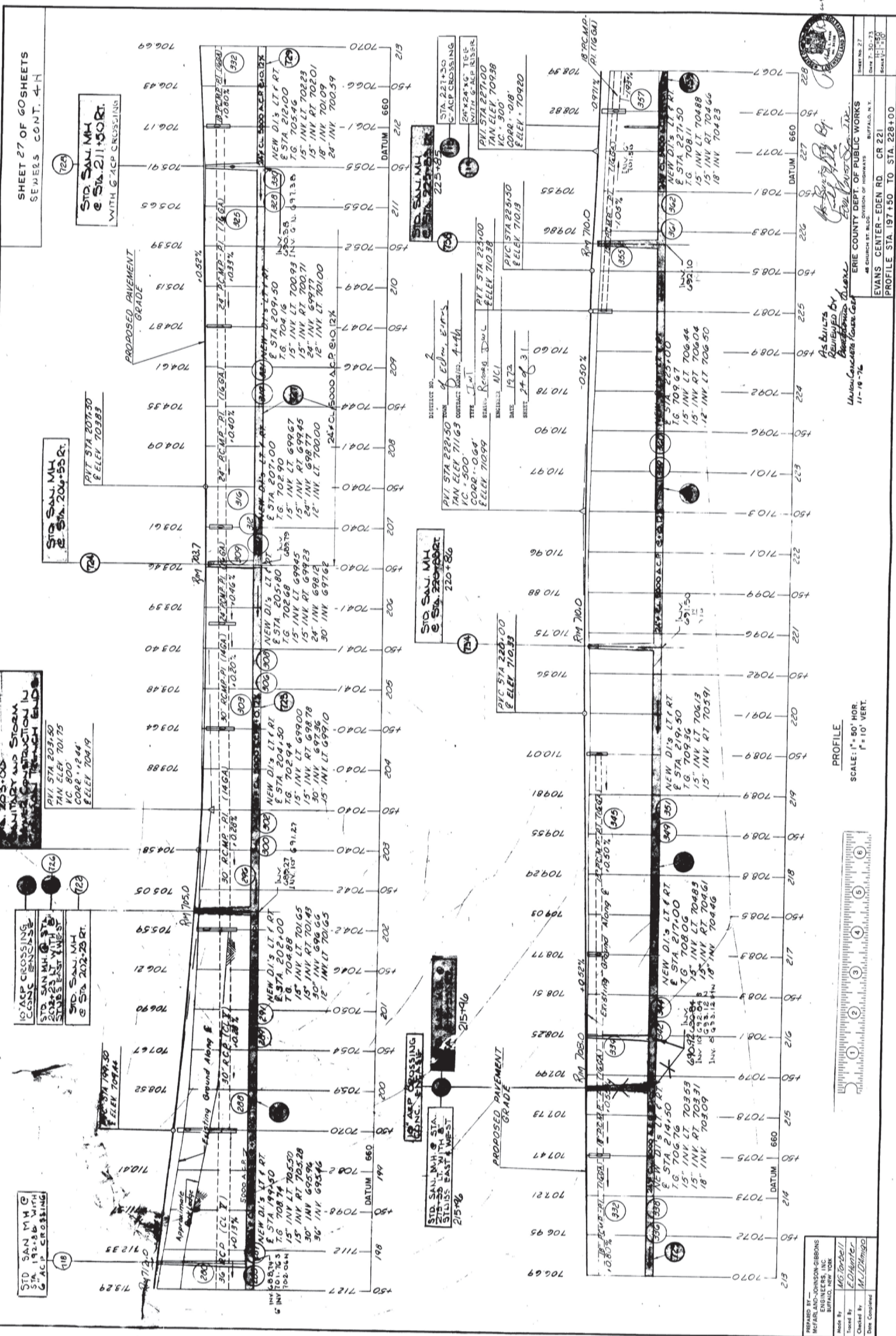
P.I. & NO. 7
N- 966,667.09
E- 390,378.36

ERIE COUNTY DEPT. OF PUBLIC WORKS DIVISION OF HIGHWAYS 48 CHURCH ST. BLDG. BUFFALO, N. Y.	SHEET NO. 26 DATE 7-30-73 SCALE 1" = 50'
EVANS CENTER - EDEN RD. CR 221 PLAN STA 213+00 TO STA 228+00	

1 cm = 10 mm

0 1 2 3 4 5 6

SHEET 27 OF 60 SHEETS
SEWERS CONT. 4H



PREPARED BY: MCGRAW-HILL ENGINEERING, INC. BUFFALO, N.Y.

MADE BY: MCGRAW-HILL

TRACED BY: E.D. HART

DATE COMPLETED: 11-19-76

SCALE: 1" = 50' HOR. 1" = 10' VERT.

PROFILE

AS BUILT BY: [Signature]

REVIEWED BY: [Signature]

ERIE COUNTY DEPT. OF PUBLIC WORKS

48 CHURCH ST. BLDG. DIVISION OF HIGHWAYS

EVANS CENTER-EDEN RD. CR 221

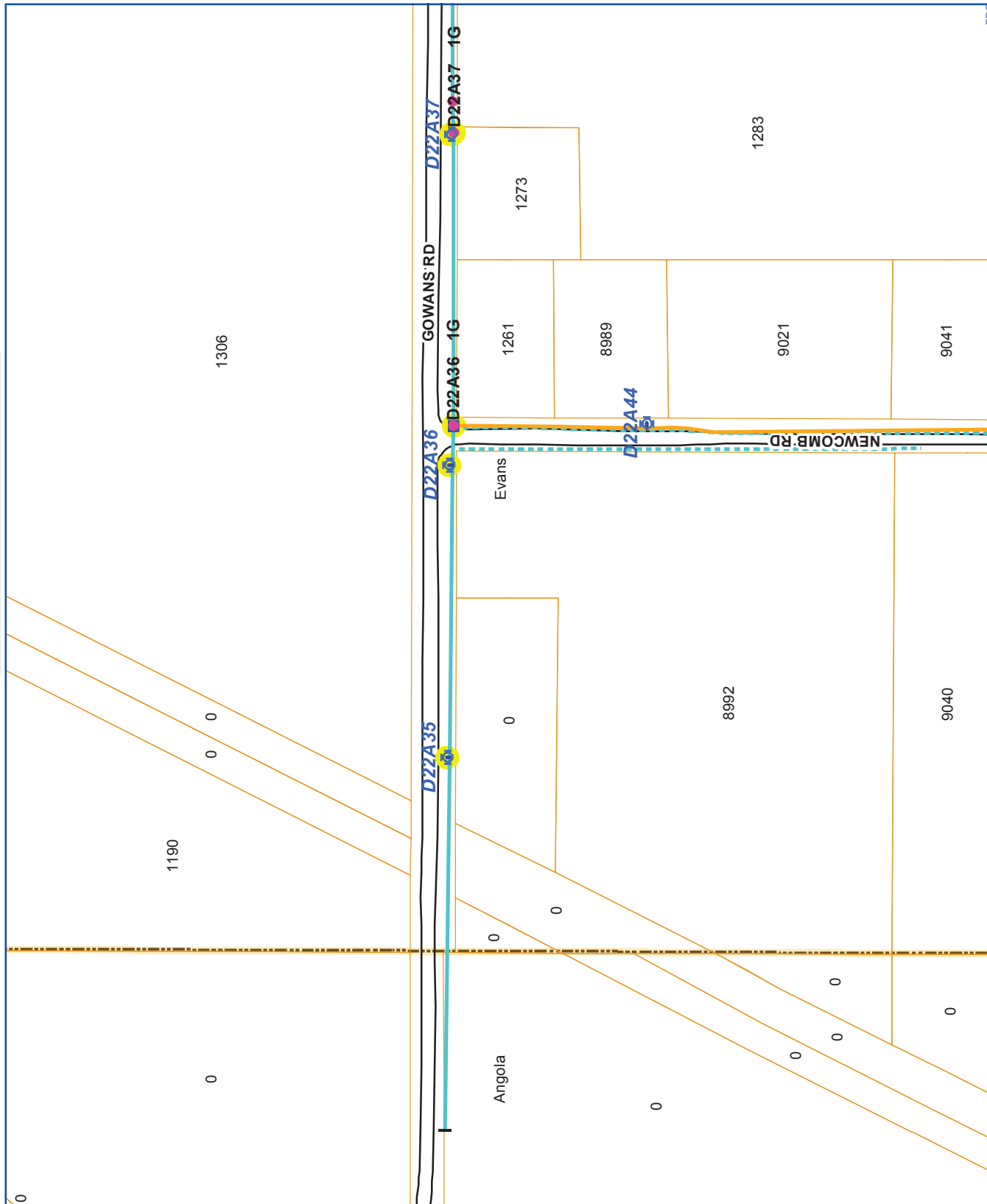
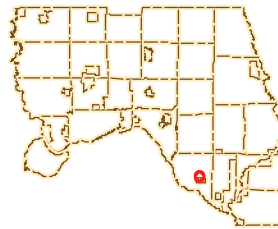
PROFILE STA 197+00 TO STA 228+00

Gowans Rd., Evans, NY

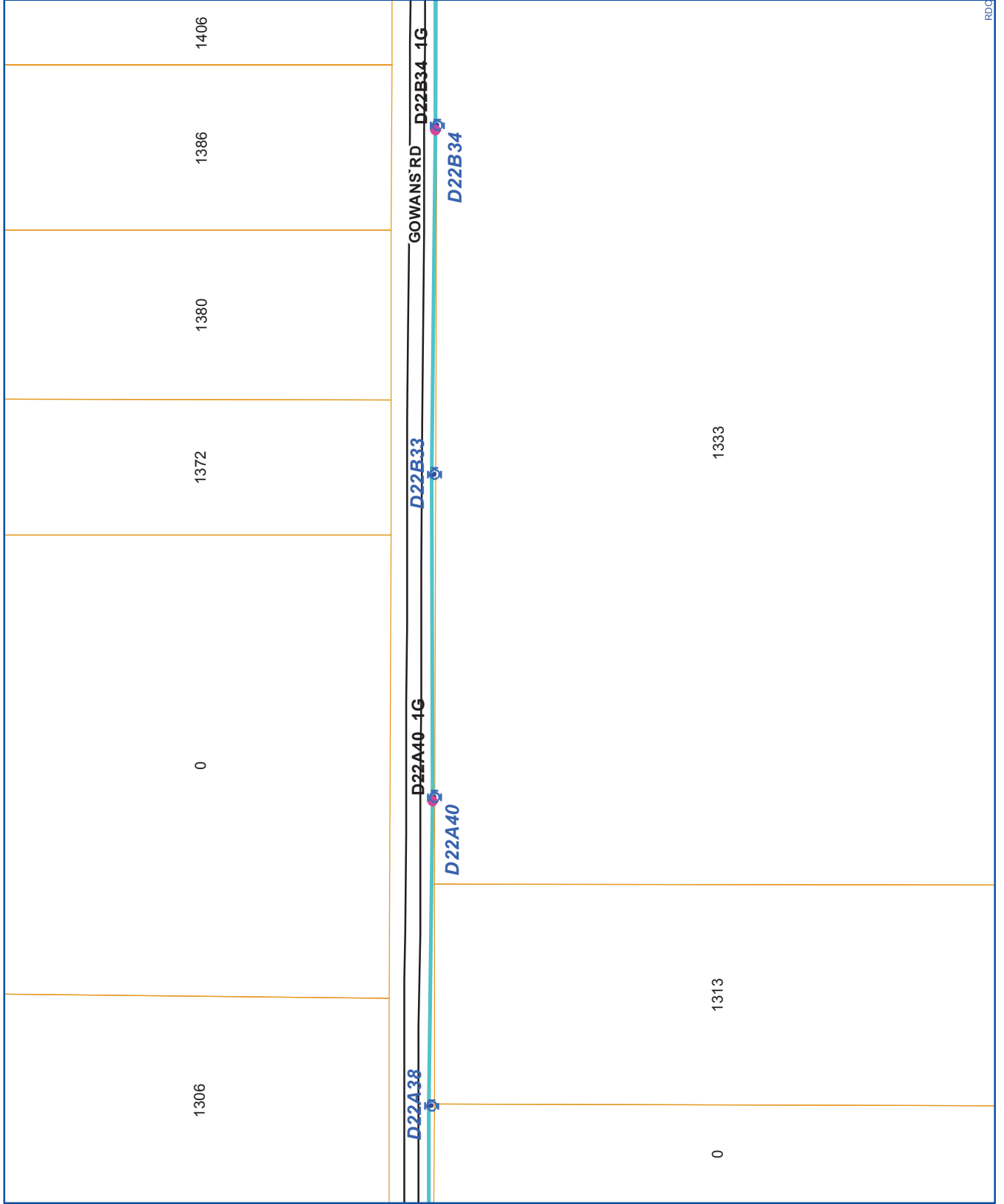


Legend:

- Mains**
- Owned By Others
 - Active Main
 - Abandoned Main
 - Active Main Not Field Checked
 - Hydrant Stubs
 - Valved Off - Leak
 - Private Mains
 - Temporary Mains
 - Parcels



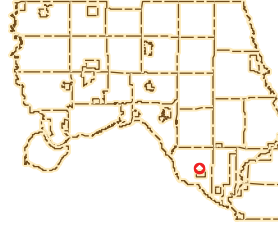
Gowans Rd., Evans, NY



Legend:

Mains

- Owned By Others
- Active Main
- Abandoned Main
- Active Main Not Field Checked
- Hydrant Stubs
- Valved Off - Leak
- Private Mains
- Temporary Mains
- Parcels



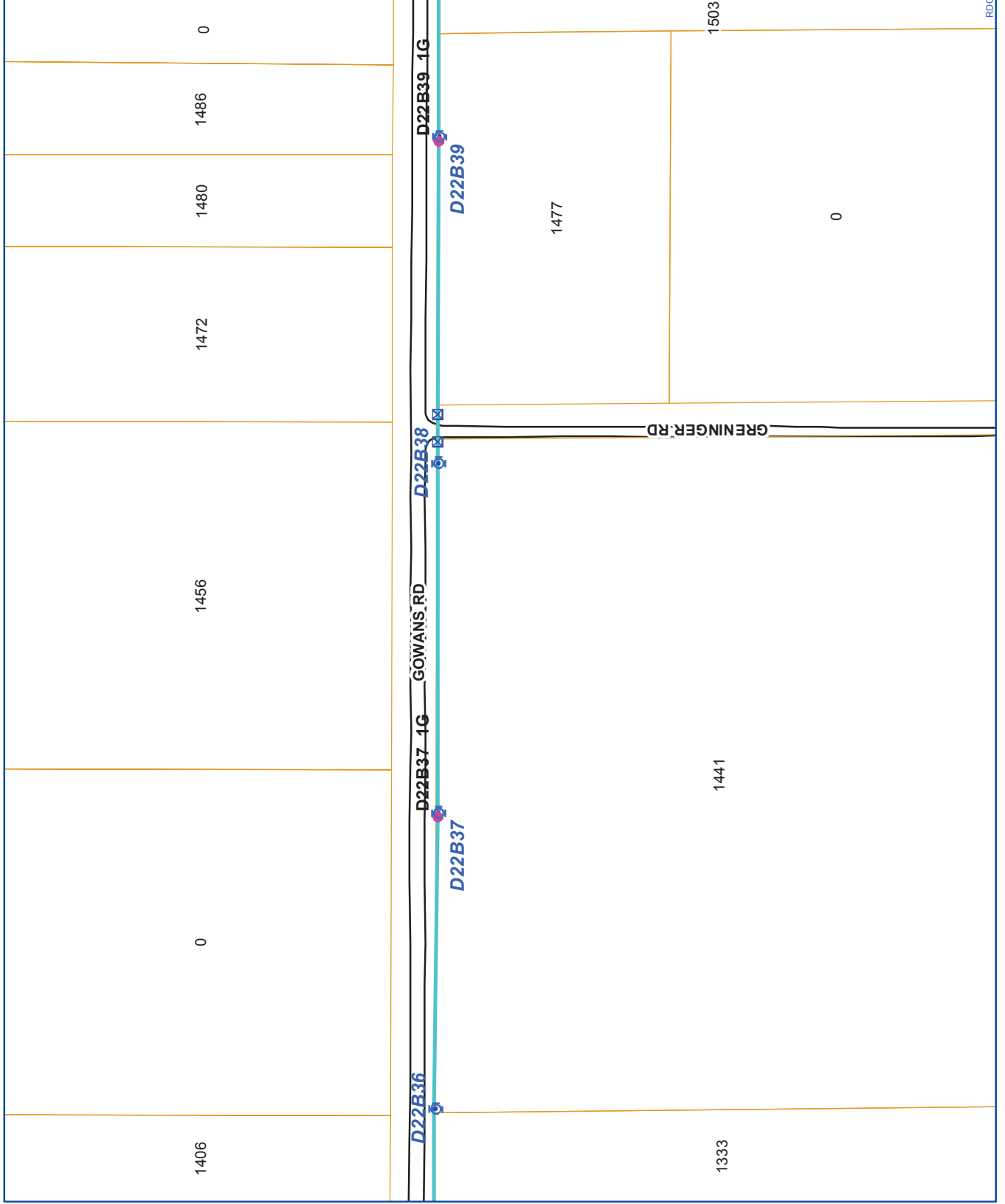
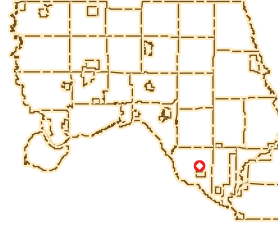
Gowans Rd., Evans, NY



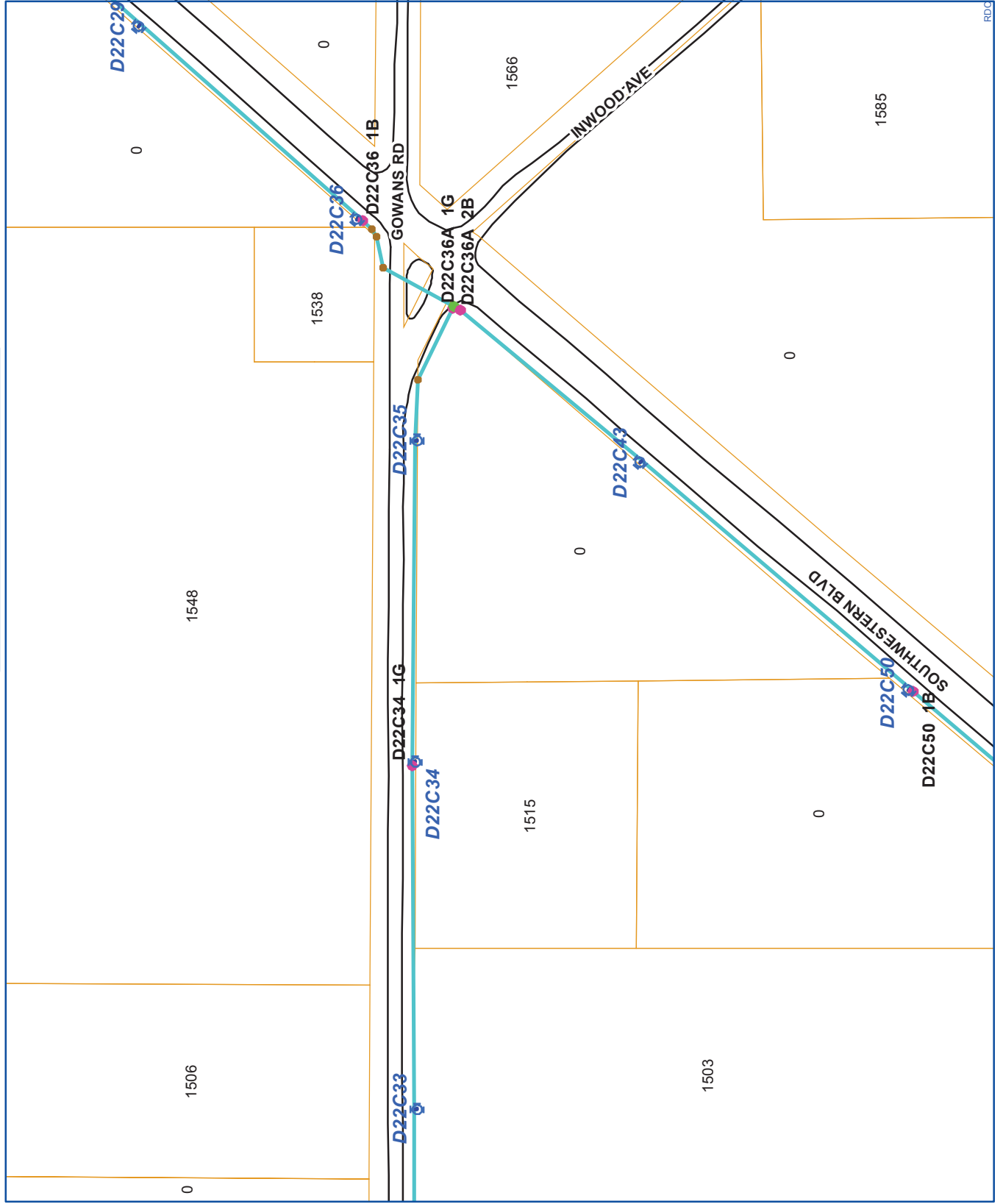
Legend:

Mains

- Owned By Others
- Active Main
- Abandoned Main
- Active Main Not Field Checked
- Hydrant Stubs
- Valved Off - Leak
- Private Mains
- Temporary Mains
- Parcels

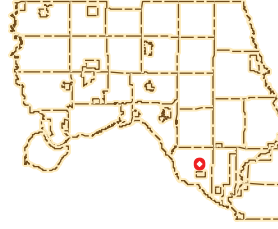


Gowans Rd., Evans, NY



Legend:

- Mains**
- Owned By Others
 - Active Main
 - Abandoned Main
 - Active Main Not Field Checked
 - Hydrant Stubs
 - Valved Off - Leak
 - Private Mains
 - Temporary Mains
 - Parcels





ERIE COUNTY
WATER AUTHORITY
BUFFALO, NEW YORK

REVISED
DR. R.D.C.

DATE: 3/30/2016

FIELD

REVISED
DR.

DATE:

OFFICE

TOWN OF EVANS

W.D. 5

D22-A36

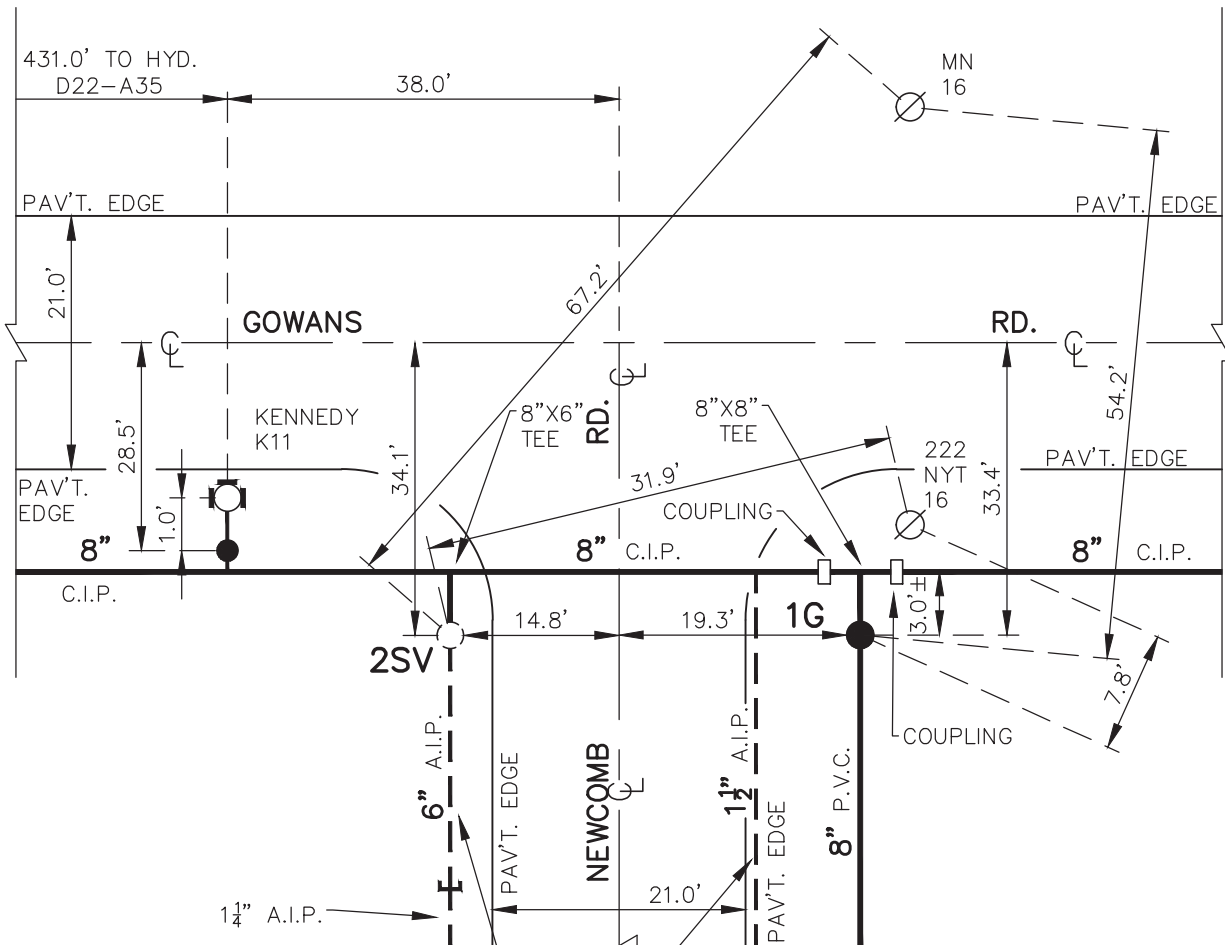
DETAIL SHT. NO.

201300063

CURRENT PROJECT NO.



1G TO 2SV = 34.1'
1G TO HYD. = 58.2'
2SV TO HYD. = 24.7'



W.L.'S PLACED A.I.P.
BY TURNING VALVES
TO "OFF" POSITION
PER EVTN-928-1301.

NOTE: DETAIL DRAWN ON CAD SYSTEM.
± DIMENSIONS FROM AS-BUILTS, NOT
FIELD CHECKED.

EVTN-928-1301
DWG.SET 1(98)
EVTN-928-0501

D22-A36

DETAIL SHT. NO.

MASTER COPY



ERIE COUNTY
WATER AUTHORITY
BUFFALO, NEW YORK

DR. D.K.C.

DR.

DATE: 7.13.15

DATE:

FIELD

OFFICE

TOWN OF EVANS

W.D. 5

D22-A37
DETAIL SHT. NO.

200900192
CURRENT PROJECT NO.



448.0' TO €

506.0' TO HYD. D22-A38

NEWCOMB RD.

PAV'T. EDGE

PAV'T. EDGE

21.0'

GOWANS RD.

PAV'T.

EDGE

30.3'

PAV'T.

27.9'

EDGE

KENNEDY
KII

8" C.I.P.

8" P.V.C.

1G

2G

2M
18"
19"

33.4'

13.3'

49.2'

1G TO 2G - 45.8'

39.7'

27.4'

HOUSE
#1273

HOUSE
#1283

EVTN-928-0906
DWGSET1
EVTN-928-0501

D22-A37
DETAIL SHT. NO.

MASTER COPY

RDCHydrant Inquiry RoutineCHI020-B

Hydrant Grid No: D22 - A36Hydrant X No.: -Active

Address.: GOWANS RDSt Side: SLot:

Location: 2ND HYD SE/O MILL STTown Code...: EVTN EVANS

Field Bk/Pg:

Dead End....: N

Water Dst: 345 EVANS WD #5

Fire Dist: 44020 ANGOLA FIRE PROTECTION

Valve Loc: 1.0' S/O HYD

29.9' S/O CL OF GOWANS RD

Make Code: 62 KENNEDY STANDARD K11Drain Plugged: Y Main Type: CI

Main Size: 08 Branch Size: 06Steamer:Size: 4.5 No: 1 Hose:Size: 2.5 No: 2

Comments.:

Pressure.: 65 lbs Date: 4/27/2015 Flow:gpm Date:

70 lbs6/06/2014gpm

Cur EC No: Replaced: 0Instl Dt: Grease: 6/06/2014

Pri EC No: Turn On.:Paint Dt: 6/27/2014 Thawed:

Billing Info:ECHD Approval Cmp Work Date:

C Account	Account Type	Qty	Description
60534625-5	L LEASE MANAGED	1.00	ACCOUNTING/PAYROLL DEPT

C: I=Account Inquiry

ENTER=Continue F3=Exit F5=Redisplay F6=MaintenanceF24=More Keys

RDCHydrant Inquiry RoutineCHI020-B

Hydrant Grid No: D22 - A37Hydrant X No.: -Active

Address.: 1273 GOWANS RDSt Side: SLot:

Location: 1ST HYD E/O NEWCOMB RDTown Code...: EVTN EVANS

Field Bk/Pg:

Dead End....: Y

Water Dst: 345 EVANS WD #5

Fire Dist: 44020 ANGOLA FIRE PROTECTION

Valve Loc: 1.6' S/O HYD

27.9' S/O CL OF GOWANS RD

Make Code: 62 KENNEDY STANDARD K11Drain Plugged: N Main Type: CI

Main Size: 08 Branch Size: 06Steamer:Size: 4.5 No: 1 Hose:Size: 2.5 No: 2

Comments.:

Pressure.: 65 lbs Date: 4/27/2015 Flow:gpm Date:

70 lbs6/06/2014gpm

Cur EC No: Replaced: 0Instl Dt: Grease: 6/06/2014

Pri EC No: Turn On.: Paint Dt: 6/27/2014 Thawed:

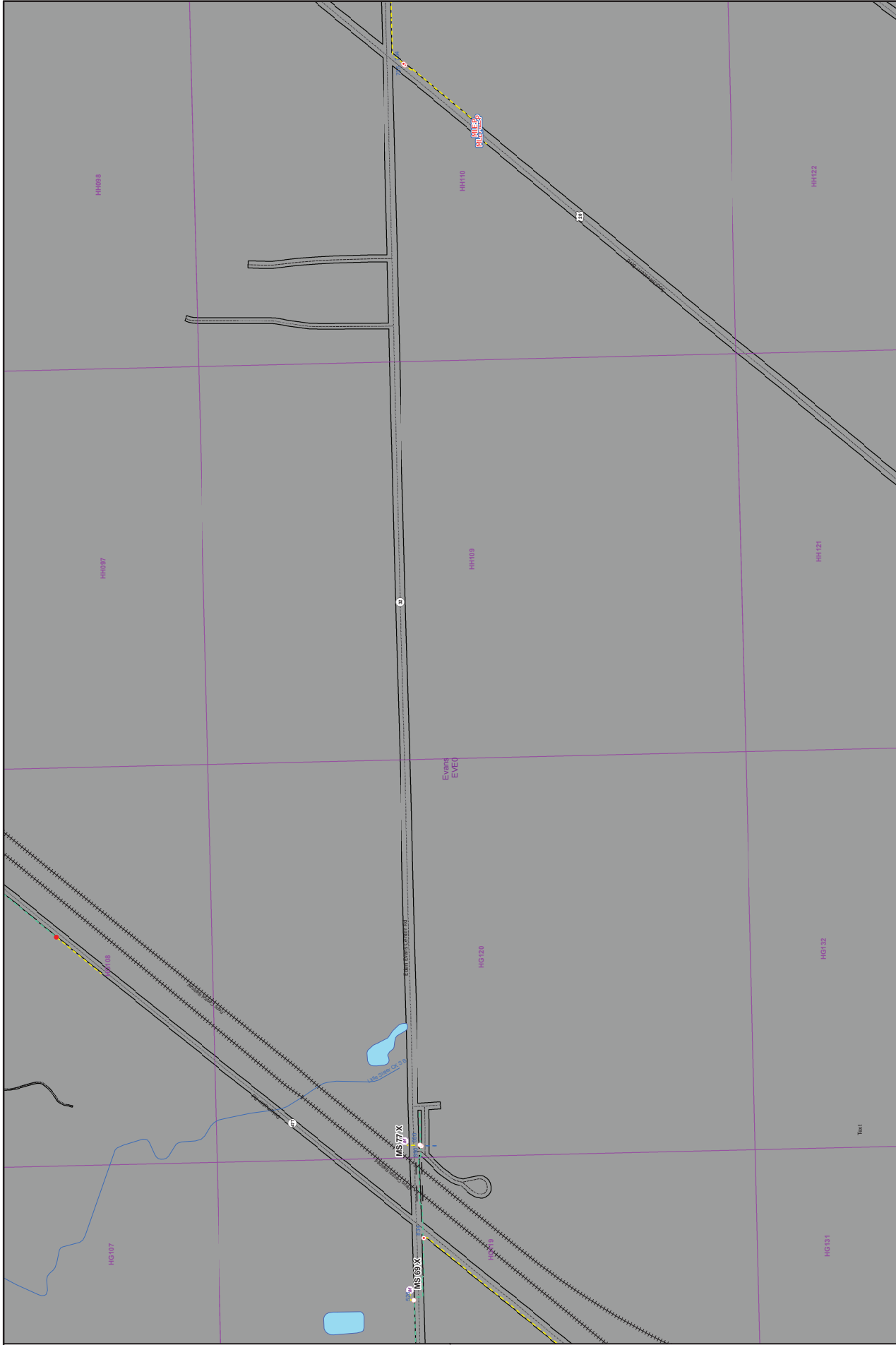
Billing Info:ECHD Approval Cmp Work Date:

C Account	Account Type	Qty	Description
60534625-5	L LEASE MANAGED	1.00	ACCOUNTING/PAYROLL DEPT

C: I=Account Inquiry

ENTER=Continue F3=Exit F5=Redisplay F6=MaintenanceF24=More Keys

- NFG Legend**
- Main Material**
- Bare Steel Main
 - Cast Iron Main
 - Coated Steel Main
 - Fiberglass Main
 - Plastic Main
 - PVC Main
 - Unknown
 - Wrought Iron Main
- Main Pressure Type**
- High, Direct Bury
 - Low, Direct Bury
 - Low, Inserted
 - Medium, Direct Bury
 - Medium, Inserted
- Valve**
- BALL
 - BURIED
 - BUTTERFLY
 - GATE
 - LUBE PLUG
 - ORBIT
 - OTHER
 - PLASTIC
 - STOP COCK
- Fitting**
- 4-Way Tee
 - Ell
 - End Cap
 - Main Break
 - Reducer
 - Tee
 - Transition
- Controlable Fitting**
- Controlable Fitting
 - Distance to CL
 - Distance to Inters. St
 - Distance off Curb



National Fuel

The location of gas facilities are approximate and should not be used for compiling engineering data without further field check for verification.



MultNet Street Data © 2006-2011 TomTom. All rights reserved.
Approximate Scale
0 375 750 1500 Feet
10/29/2015

Section 5: Conceptual Site Plans



LEGEND

- FEDERALLY REGULATED WETLANDS
- NYSDEC REGULATED WETLANDS
- NYSDEC REGULATED 100' BUFFER AREA
- PARK BOUNDARY

250 0 500 1,000
1 INCH = 500 FEET

UTILITY LEGEND

- EXISTING WATER MAIN
- EXISTING SANITARY SEWER
- EXISTING GAS MAIN
- EXISTING ELECTRIC

EVANS GOWEN ROAD SITE
TOTAL ACREAGE = 349 ACRES ±



Clark Patterson Lee
DESIGN PROFESSIONALS

ERIE COUNTY DEPARTMENT OF ENVIRONMENT & PLANNING

APRIL 2016

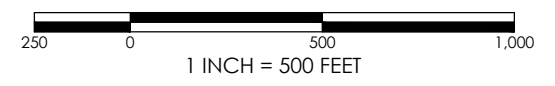
EVANS GOWEN ROAD SITE - OPTION #1

Scale: 1"=500'



LEGEND

- FEDERALLY REGULATED WETLANDS
- NYSDEC REGULATED WETLANDS
- NYSDEC REGULATED 100' BUFFER AREA
- PARK BOUNDARY



UTILITY LEGEND

- EXISTING WATER MAIN
- EXISTING SANITARY SEWER
- EXISTING GAS MAIN
- EXISTING ELECTRIC



Clark Patterson Lee
DESIGN PROFESSIONALS

ERIE COUNTY DEPARTMENT OF ENVIRONMENT & PLANNING

APRIL 2016

EVANS GOWANS ROAD SITE - OPTION #2

Scale: 1"=500'

Section 6: Cost Estimates

ERIE COUNTY DEPARTMENT OF ENVIRONMENT & PLANNING
AGRIBUSINESS FEASIBILITY
EVANS - GOWANS ROAD PARK
APRIL 2016

Concept Option #1

ITEM	DESCRIPTION	ESTIMATED QUANTITY	UNIT	ESTIMATED UNIT COST	TOTAL ESTIMATED COST
On-Site Infrastructure Improvements					
1	General Site Grading	1	LS	\$ 150,000.00	\$ 150,000
2	Roadway Construction	9,100	LF	\$ 275.00	\$ 2,502,500
3	Furnish and Install New 12" PVC Water Main	9,100	LF	\$ 70.00	\$ 637,000
4	Furnish and Install New 12"SDR-21 PVC Gravity Sanitary Sewer Main	9,100	LF	\$ 125.00	\$ 1,137,500
5	Electric + Transmission line planning/engineering, right of way/easement acquisition (By Utility)	9,100	LF	\$ 50.00	\$ 455,000
6	Natural Gas Main planning/engineering, right of way/easement acquisition (by Utility)	9,100	LF	\$ 50.00	\$ 455,000
7	Telephone and Communications (By Utility)	9,100	LF	\$ 30.00	\$ 273,000
On-Site Infrastructure Subtotal =					\$ 5,610,000
				ESTIMATED SUBTOTAL =	\$ 5,610,000
				CONTINGENCY (10%) =	\$ 561,000
				LEGAL, ENGINEERING & ADMINISTRATION (25%) =	\$ 1,402,500
ESTIMATED TOTAL CAPITAL COST =					\$ 7,574,000

ERIE COUNTY DEPARTMENT OF ENVIRONMENT & PLANNING
AGRIBUSINESS FEASIBILITY
EVANS - GOWANS ROAD PARK
APRIL 2016

Concept Option #2

ITEM	DESCRIPTION	ESTIMATED QUANTITY	UNIT	ESTIMATED UNIT COST	TOTAL ESTIMATED COST
On-Site Infrastructure Improvements					
1	General Site Grading	1	LS	\$ 150,000.00	\$ 150,000
2	Roadway Construction	11,300	LF	\$ 275.00	\$ 3,107,500
3	Furnish and Install New 12" PVC Water Main	11,300	LF	\$ 70.00	\$ 791,000
4	Furnish and Install New 12"SDR-21 PVC Gravity Sanitary Sewer Main	11,300	LF	\$ 125.00	\$ 1,412,500
5	Electric + Transmission line planning/engineering, right of way/easement acquisition (By Utility)	11,300	LF	\$ 50.00	\$ 565,000
6	Natural Gas Main planning/engineering, right of way/easement acquisition (by Utility)	11,300	LF	\$ 50.00	\$ 565,000
7	Telephone and Communications (By Utility)	11,300	LF	\$ 30.00	\$ 339,000
On-Site Infrastructure Subtotal =					\$ 6,930,000
				ESTIMATED SUBTOTAL =	\$ 6,930,000
				CONTINGENCY (10%) =	\$ 693,000
				LEGAL, ENGINEERING & ADMINISTRATION (25%) =	\$ 1,732,500
				ESTIMATED TOTAL CAPITAL COST =	\$ 9,356,000

Section 7: Per Acre Cost Analysis

EVANS GOWANS ROAD SITE - COST PER ACRE ANALYSIS
APRIL 2016

Generic Environmental Impact Statement (GEIS)

ITEM	DESCRIPTION	ESTIMATED QUANTITY	UNIT	ESTIMATED UNIT COST	ESTIMATED TOTAL COST
1	GEIS	1	EA	\$ 300,000.00	\$ 300,000
				Total GEIS Cost:	\$ 300,000

Infrastructure Construction and Land Acquisition

ITEM	DESCRIPTION	ESTIMATED QUANTITY	UNIT	ESTIMATED UNIT COST	ESTIMATED TOTAL COST
2	Roadway and Utilities	1	EA	\$ 5,610,000	\$ 5,610,000
Infrastructure Construction Subtotal					\$ 5,610,000
3	Construction Contingency	10	%	\$ -	\$ 561,000
4	Legal, Administration, Engineering	25	%	\$ -	\$ 1,402,500
Infrastructure Construction Total					\$ 7,574,000
5	Land Acquisition (County Purchase)	349.00	acres	\$ 7,500.00	\$ 2,617,500
				Total Infrastructure Cost:	\$ 10,191,500

Total Estimated Project Cost: **\$ 10,491,500**
Total Acreage: 349.00
Price Per Acre (County cost): **\$ 31,000**

Less Anticipated Grants:
Potential Grant (TBD - example only)

\$ (2,000,000)

\$ (2,000,000)
349.00

Net reduction per acre: **\$ (5,731)**

Note: Gas and electric costs have been included in the total cost per acre for simplicity. Cost sharing options may be available depending on the utility and businesses within the Park.

Appendix L

Angola Hardpan Road Preferred Site Analysis

- Section 1: Location Map, Existing Site Plan
- Section 2: Zoning Map
- Section 3: Environmental Review Maps
- Section 4: Utility Record Mapping
- Section 5: Conceptual Site Plans
- Section 6: Cost Estimates
- Section 7: Per Acre Cost Analysis

Section 1: Location Map and Existing Site Plan

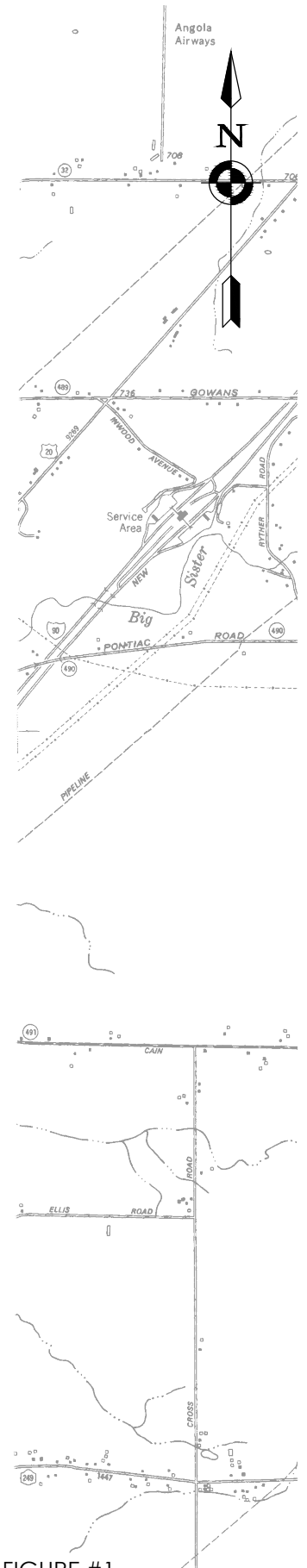
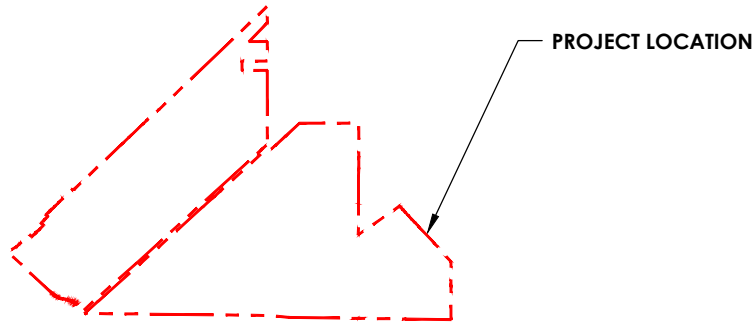


FIGURE #1



CLARK PATTERSON LEE
 DESIGN PROFESSIONALS
 205 ST. PAUL STREET, SUITE 500
 ROCHESTER, NEW YORK 14604
 TEL (800) 274-9000
 FAX (585) 232-5836
www.clarkpatterson.com

DATE: 3/18/16
 DRAWN: ZLA
 CHECKED: ARK
 SCALE: 1"=3,000'
 PROJ. #: 13605.00

ANGOLA SITE - LOCATION MAP
ERIE COUNTY AGRIBUSINESS
PARK FEASIBILITY STUDY
 ERIE COUNTY DEPARTMENT OF ENVIRONMENT & PLANNING

LEGEND

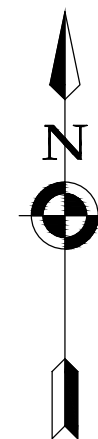
- FEDERALLY REGULATED WETLANDS
- NYSDEC REGULATED WETLANDS
- NYSDEC REGULATED 100' BUFFER AREA
- 100 YEAR FLOOD ZONE
- PARK BOUNDARY

UTILITY LEGEND

- EXISTING WATER MAIN
- EXISTING SANITARY SEWER GRAVITY MAIN
- EXISTING SANITARY SEWER FORCE MAIN
- EXISTING GAS MAIN
- EXISTING ELECTRIC

ANGOLA RAILROAD AVE SITE
TOTAL ACREAGE = 164 AC

ANGOLA HARDPAN ROAD SITE
TOTAL ACREAGE = 226 AC



300 0 600 1,200
1 INCH = 600 FEET



Clark Patterson Lee
DESIGN PROFESSIONALS

ERIE COUNTY DEPARTMENT OF ENVIRONMENT & PLANNING

FEBRUARY 2016

ANGOLA-HARDPAN ROAD SITE

Scale: 1"=600"

Section 2: Zoning Map
















TOWN OF EVANS

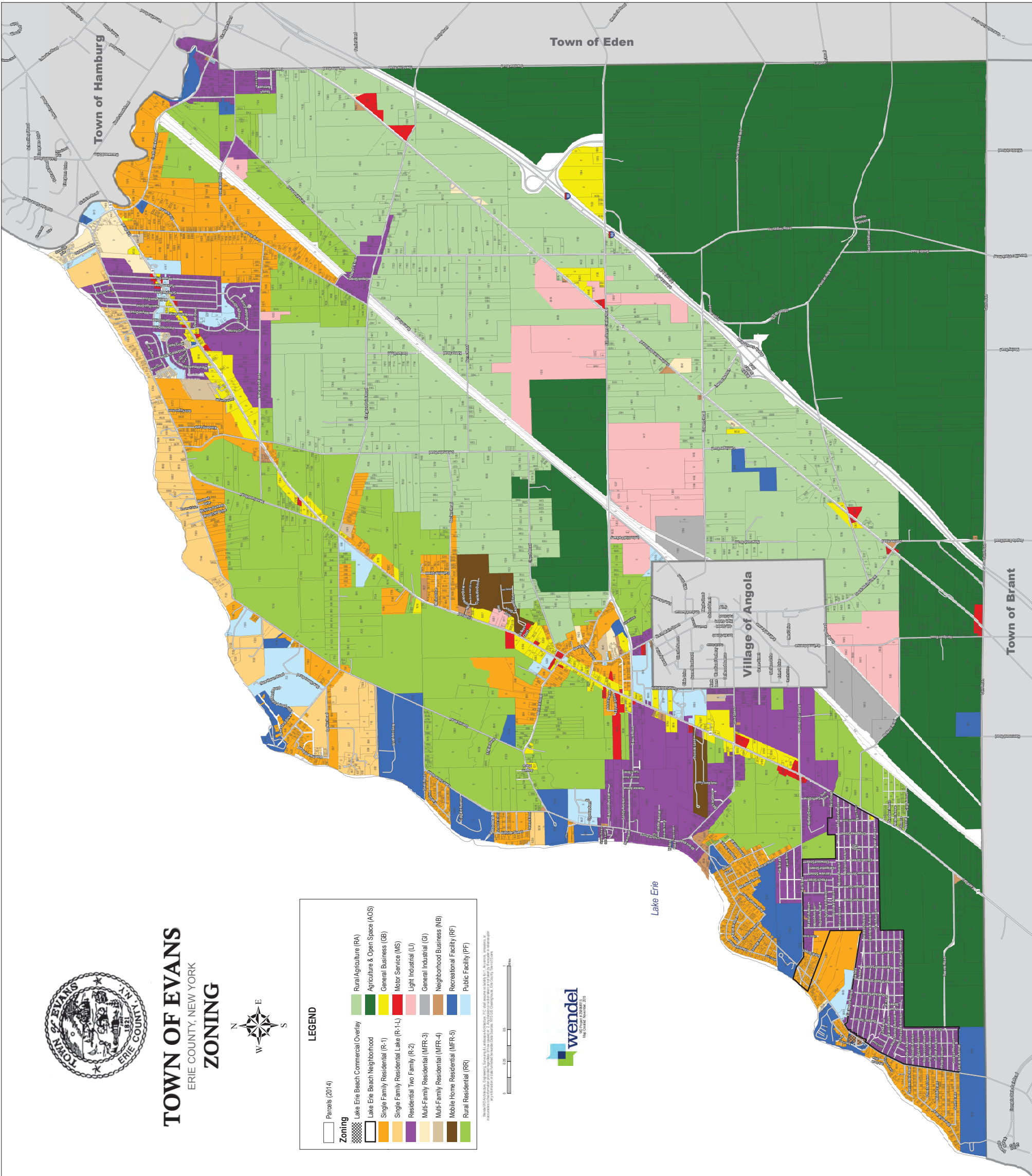
ERIE COUNTY, NEW YORK

ZONING



LEGEND	
	Parcels (2014)
Zoning	
	Lake Erie Beach Commercial Overlay
	Rural Agriculture (RA)
	Agriculture & Open Space (AOS)
	General Business (GB)
	Motor Service (MS)
	Light Industrial (LI)
	General Industrial (GI)
	Neighborhood Business (NB)
	Recreational Facility (RF)
	Public Facility (PF)
	Rural Residential (RR)
	Mobile Home Residential (MFR-5)
	Multi-Family Residential (MFR-4)
	Single Family Residential Lake (R-1-L)
	Single Family Residential (R-1)
	Residential Two Family (R-2)
	Multi-Family Residential (MFR-3)
	Neighborhood Business (NB)
	Recreational Facility (RF)
	Public Facility (PF)
	Rural Residential (RR)
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	Neighborhood Business (NB)
	Recreational Facility (RF)
	Public Facility (PF)
	Rural Residential (RR)

Map prepared by Wendel Engineering, Inc. for the Town of Evans, New York. The map is based on the 2014 parcel map and the zoning ordinance of the Town of Evans. The map is not to be used for any other purpose without the written consent of Wendel Engineering, Inc.



Section 3: Environmental Review Maps



U.S. Fish and Wildlife Service

National Wetlands Inventory

Angola

Mar 18, 2016



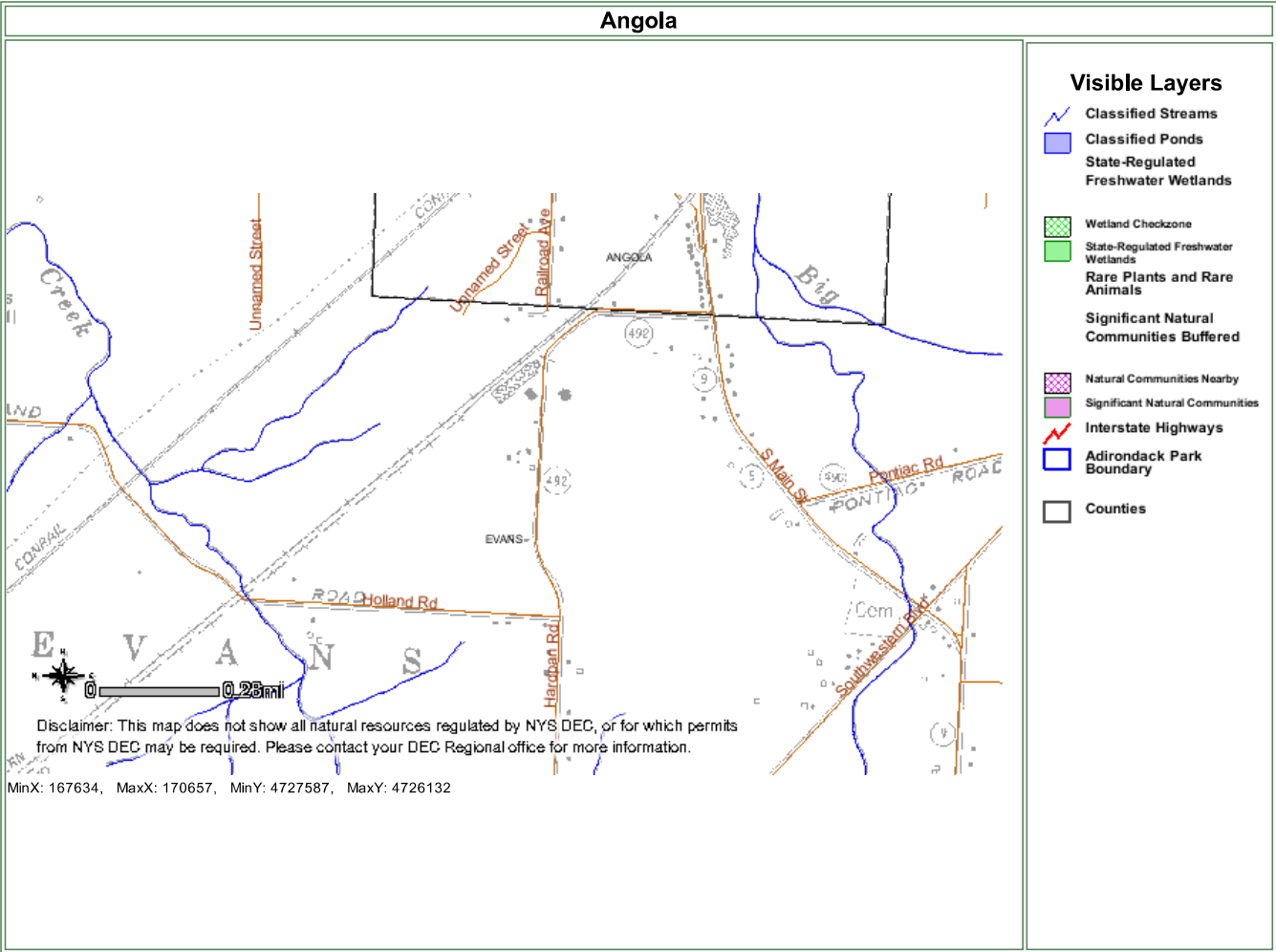
Wetlands

- Freshwater Emergent
- Freshwater Forested/Shrub
- Estuarine and Marine Deepwater
- Estuarine and Marine
- Freshwater Pond
- Lake
- Riverine
- Other

This map is for general reference only. The US Fish and Wildlife Service is not responsible for the accuracy or currentness of the base data shown on this map. All wetlands related data should be used in accordance with the layer metadata found on the Wetlands Mapper web site.

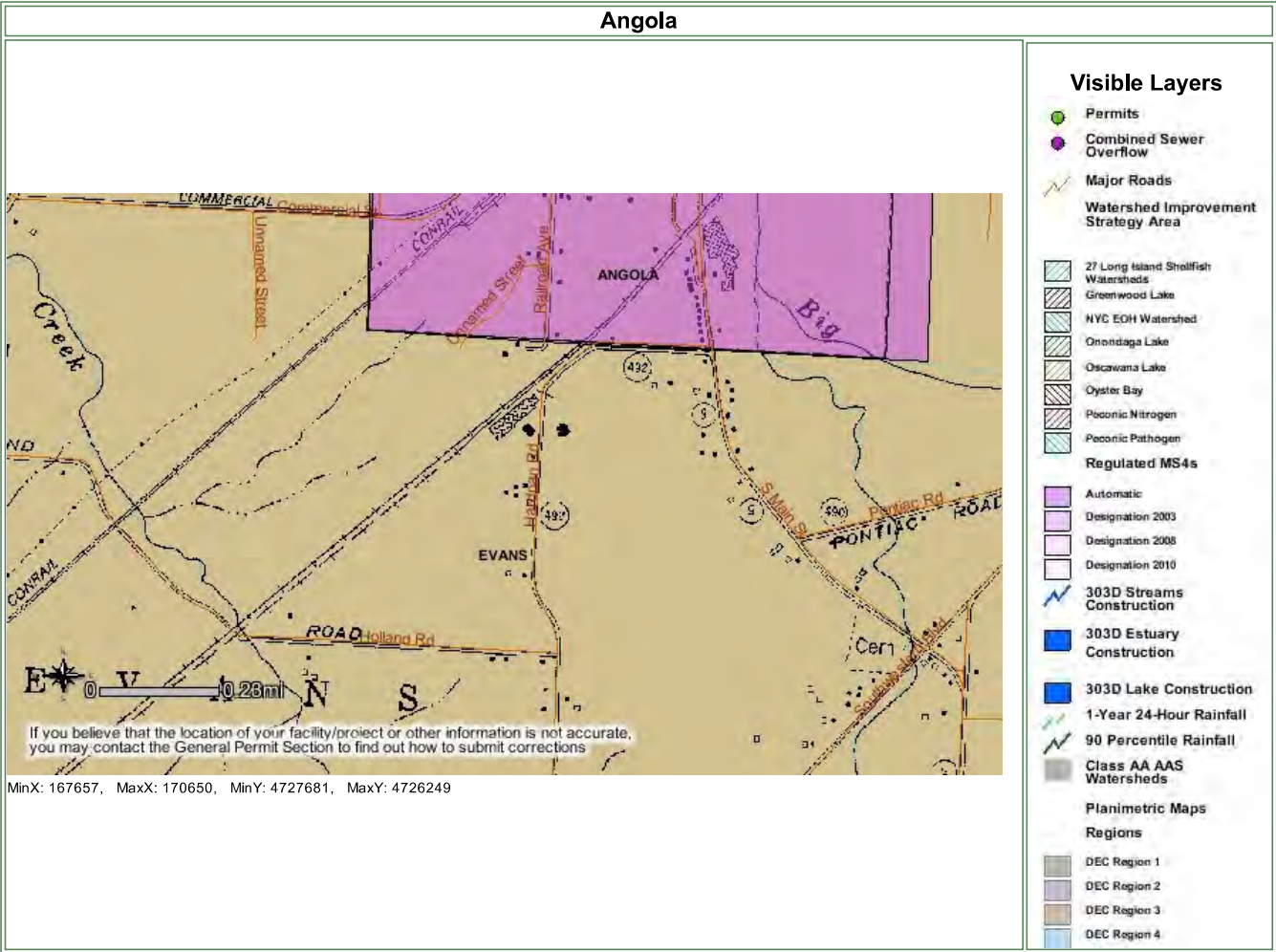
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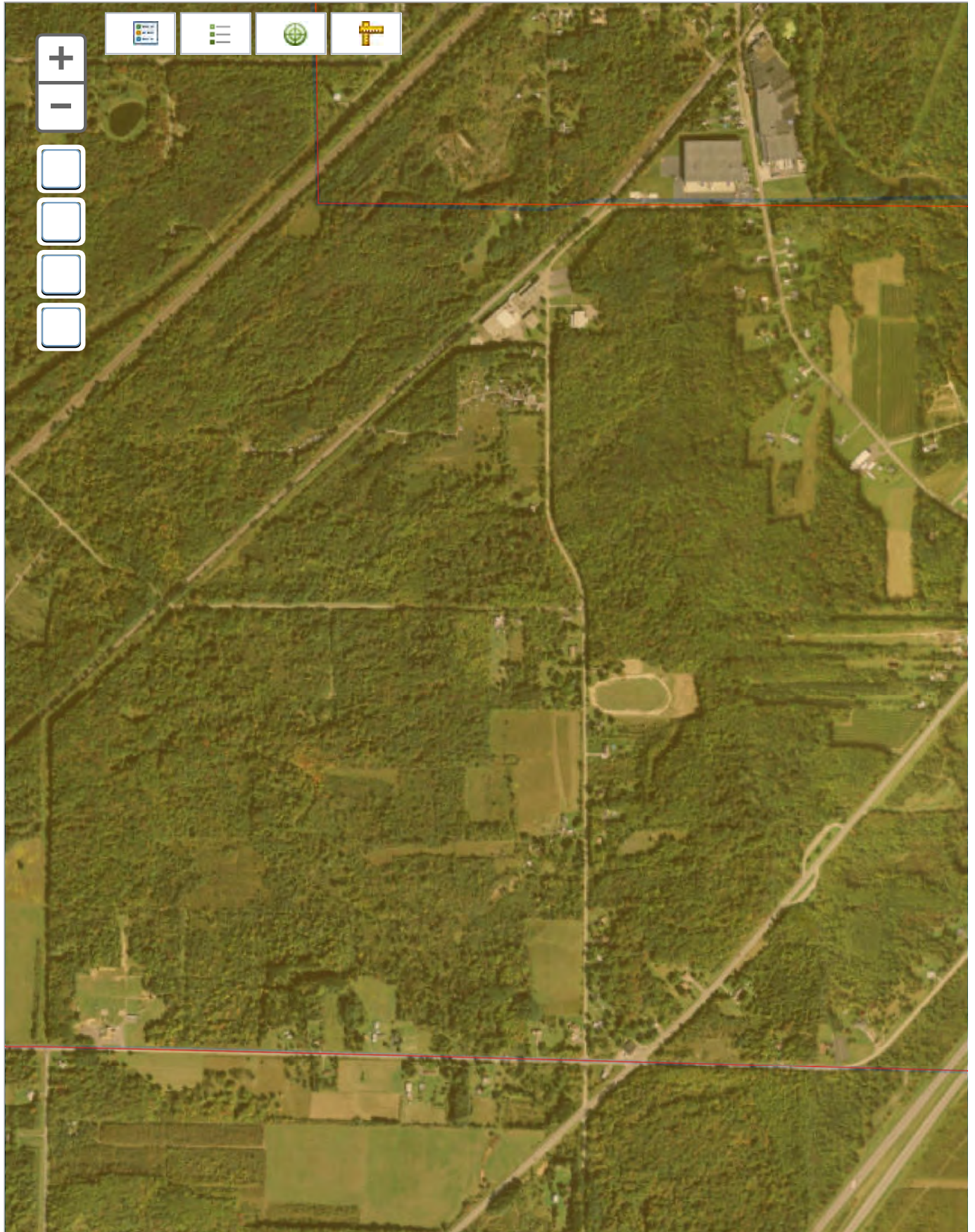
Please set your printer orientation to "Landscape".



Disclaimer: This map was prepared by the New York State Department of Environmental Conservation using the most current data available. It is deemed accurate but is not guaranteed. NYS DEC is not responsible for any inaccuracies in the data and does not necessarily endorse any interpretations or products derived from the data.

Please set your printer orientation to "Landscape".





Legend

FIRM Panels



Coastal Gages



Gages



Cross-Sections



Base Flood Elevations



Coastal Barrier Resources System Area



Levees



Unaccredited Levee



Accredited Levee

General Structures



Flood Structure



Bridge



Dam, Weir, Jetty



Other Structure

Flood Hazard Boundaries



Limit Lines



SFHA / Flood Zone Boundary



Other Boundaries

Flood Hazard Zones



1% Annual Chance Flood Hazard



Regulatory Floodway



Special Floodway



Area of Undetermined Flood Hazard



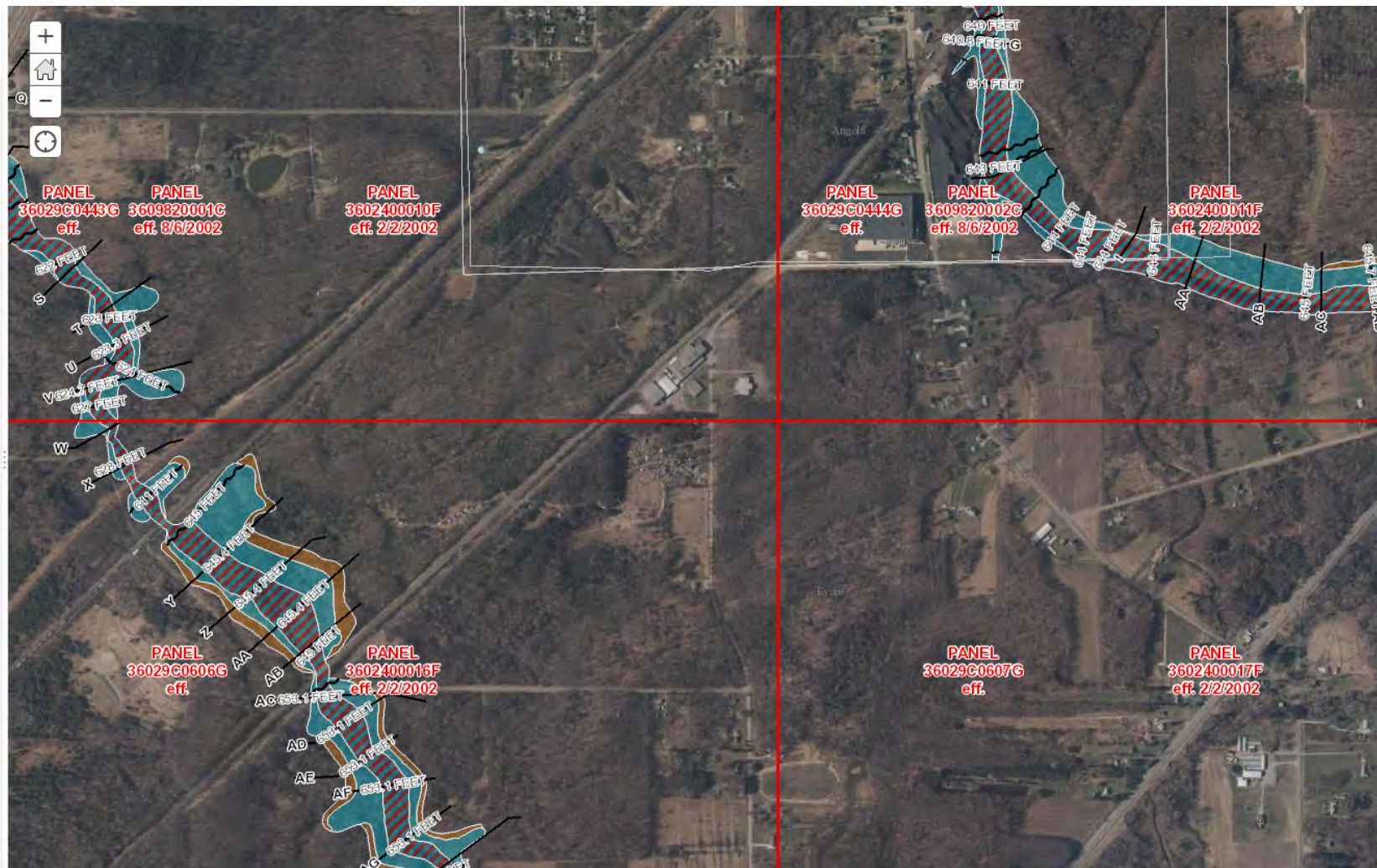
0.2% Annual Chance Flood Hazard



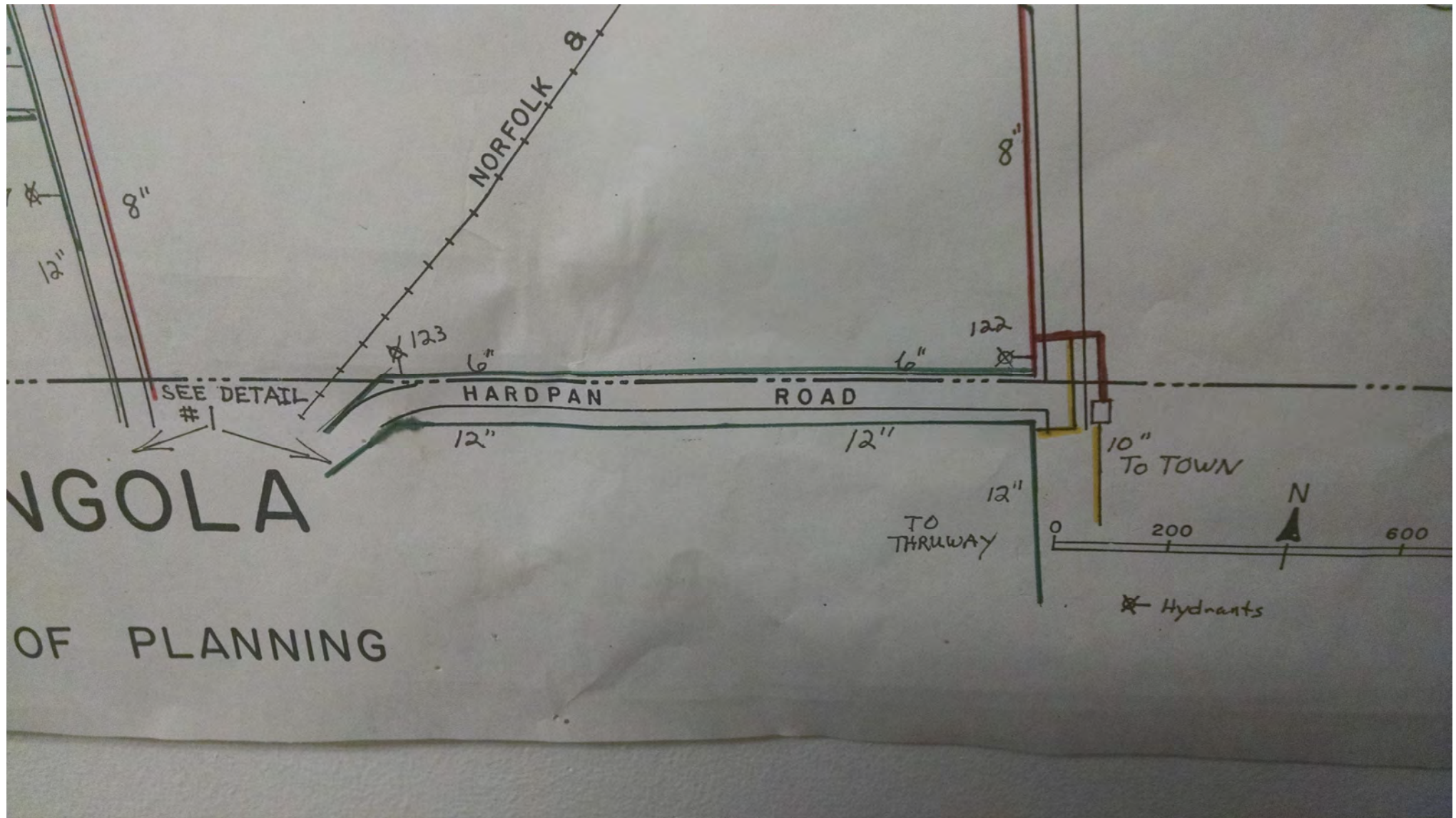
Future Conditions 1% Annual Chance Flood Hazard



Area with Reduced Risk Due to Levee

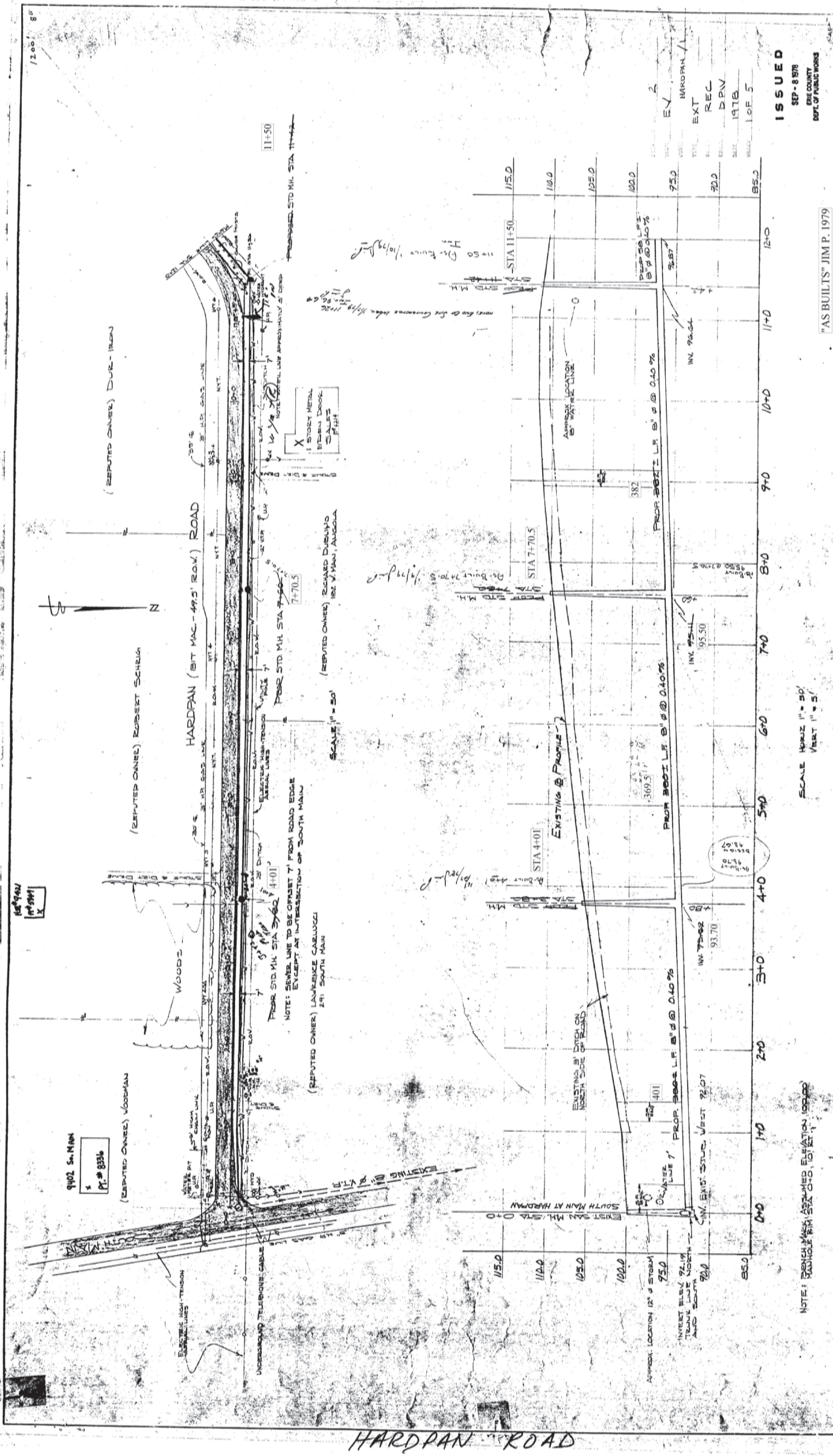



Section 4: Utility Record Mapping



NGOLA

OF PLANNING





ERIE COUNTY
DEPARTMENT OF PUBLIC WORKS
DIV. DRAINAGE SANITATION & REFUSE DISPOSAL
95 FRANKLIN ST.
BUFFALO, N. Y. 14202

SEWER DISTRICT NO. 2
HARDPAN ROAD
SANITARY SEWER EXTENSION

DATE: 9/7/73
SCALE: 1" = 5'
JOB NO.: 37337

DESIGNED BY: JIM P.
CHECKED BY: RFG
DATE: 9/7/73
SCALE: 1" = 5'
JOB NO.: 37337

ERIE COUNTY
DEPARTMENT OF PUBLIC WORKS
DIV. DRAINAGE SANITATION & REFUSE DISPOSAL
95 FRANKLIN ST.
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DESIGNED BY: JIM P.
CHECKED BY: RFG
DATE: 9/7/73
SCALE: 1" = 5'
JOB NO.: 37337

SCALE: HORIZ. 1" = 50'
VERT. 1" = 5'

NOTE: ELEVATIONS ASSUMED ELEVATION 100.00
UNLESS OTHERWISE NOTED



12-420

978 1266



(SEE HARDPAN RD L.P.G. DWG)



	37337 SEWER LICENSE	<i>Page 8 of 10</i>	SHEET NO.	2	OF 6
			DATE	2/27/78	SCALE
ERIE COUNTY DEPARTMENT OF PUBLIC WORKS DIV. DRAINAGE, SANITATION & REFUSE DISPOSAL 95 FRANKLIN ST. BUFFALO, N. Y. 14202		SEWER DISTRICT NO. 2 HARKJAN ROAD SANITARY SEWER EXTENSION			
		DRAWN CHECKED 1/28/78			

NFG Legend

Main Material

- Bare Steel Main
- Cast Iron Main
- Coated Steel Main
- Fiberglass Main
- Plastic Main
- PVC Main
- Unknown
- Wrought Iron Main

Main Pressure Type

- High, Direct Bury
- Low, Direct Bury
- Low, Inserted
- Medium, Direct Bury
- Medium, Inserted

Valve

- BALL
- BURIED
- BUTTERFLY
- GATE
- LUBE PLUG
- ORBIT
- OTHER
- PLASTIC
- STOP COCK

Fitting

- 4-Way Tee
- Ell
- End Cap
- MainBreak
- Reducer
- Tee
- Transition

Controllable Fitting

- Controllable Fitting

- Distance to CL
- Distance to Inters. St
- Distance off Curb



Section 5: Conceptual Site Plans

LEGEND

- FEDERALLY REGULATED WETLANDS
- NYSDEC REGULATED WETLANDS
- NYSDEC REGULATED 100' BUFFER AREA
- 100 YEAR FLOOD ZONE
- PARK BOUNDARY

UTILITY LEGEND

- EXISTING WATER MAIN
- EXISTING SANITARY SEWER GRAVITY MAIN
- EXISTING SANITARY SEWER FORCE MAIN
- EXISTING GAS MAIN
- EXISTING ELECTRIC

ANGOLA RAILROAD AVE SITE
TOTAL ACREAGE = 164 AC

ANGOLA HARDPAN ROAD SITE
TOTAL ACREAGE = 226 AC

HOLLAND RD

MESI DR

RAILROAD AVE
HARDPAN RD
PENN CENTRAL RAILROAD
GOYA FOODS
GOYA FOODS
SOLAR MAIN STREET
HOLLAND RD

160,000 SF

150,000 SF

55,000 SF

30,000 SF

130,000 SF

80,000 SF

35,000 SF

35,000 SF

30,000 SF

120,000 SF

30,000 SF

165,000 SF

105,000 SF

130,000 SF

105,000 SF

125,000 SF

225,000 SF

300 0 600 1,200
1 INCH = 600 FEET

LEGEND

- FEDERALLY REGULATED WETLANDS
- NYSDEC REGULATED WETLANDS
- NYSDEC REGULATED 100' BUFFER AREA
- 100 YEAR FLOOD ZONE
- PARK BOUNDARY

UTILITY LEGEND

- EXISTING WATER MAIN
- EXISTING SANITARY SEWER GRAVITY MAIN
- EXISTING SANITARY SEWER FORCE MAIN
- EXISTING GAS MAIN
- EXISTING ELECTRIC

ANGOLA RAILROAD AVE SITE
TOTAL ACREAGE = 164 AC

ANGOLA HARDPAN ROAD SITE
TOTAL ACREAGE = 226 AC

HOLLAND RD

MESI DR

RAILROAD AVE

HARDPAN RD

PENNSYLVANIA AND WESTERN RAILROADS

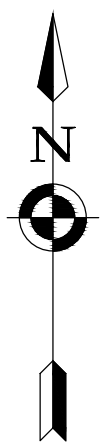
GOYA FOODS

GOYA FOODS

SOLEM MAIN STREET

POWELL RD

300 0 600 1,200
1 INCH = 600 FEET



Clark Patterson Lee
DESIGN PROFESSIONALS

ERIE COUNTY DEPARTMENT OF ENVIRONMENT & PLANNING

FEBRUARY 2016

ANGOLA - HARDPAN ROAD - OPTION #2

Scale: 1"=600"

Section 6: Cost Estimates

ERIE COUNTY DEPARTMENT OF ENVIRONMENT & PLANNING
AGRIBUSINESS FEASIBILITY
ANGOLA - HARDPAN ROAD
MARCH 2016

Concept Option #1

ITEM	DESCRIPTION	ESTIMATED QUANTITY	UNIT	ESTIMATED UNIT COST	TOTAL ESTIMATED COST
On-Site Infrastructure Improvements					
1	General Site Grading	1	LS	\$ 150,000.00	\$ 150,000
2	Roadway Improvements ¹	4,500	LF	\$ 150.00	\$ 675,000
3	Roadway Construction ²	5,700	LF	\$ 275.00	\$ 1,567,500
4	Furnish and Install New 12" PVC Water Main	5,700	LF	\$ 70.00	\$ 399,000
5	Furnish and Install New 12" SDR-21 PVC Gravity Sanitary Sewer Main	5,700	LF	\$ 125.00	\$ 712,500
6	Electric + Transmission line planning/engineering, right of way/easement acquisition (By Utility)	5,700	LF	\$ 50.00	\$ 285,000
7	Natural Gas Main planning/engineering, right of way/easement acquisition (by Utility)	5,700	LF	\$ 50.00	\$ 285,000
8	Telephone and Communications (By Utility)	5,700	LF	\$ 30.00	\$ 171,000
On-Site Infrastructure Subtotal =					\$ 4,245,000
				ESTIMATED SUBTOTAL =	\$ 4,245,000
				CONTINGENCY (10%) =	\$ 424,500
				LEGAL, ENGINEERING & ADMINISTRATION (25%) =	\$ 1,061,250
ESTIMATED TOTAL CAPITAL COST =					\$ 5,731,000

Notes:

1. Hardpan Road is assumed to be in adequate condition to accept truck traffic. Roadway Improvements consist of storm, striping, new top course asphalt, etc.
2. Roadway Construction includes construction of new roadways through the site.

ERIE COUNTY DEPARTMENT OF ENVIRONMENT & PLANNING
 AGRIBUSINESS FEASIBILITY
 ANGOLA - HARDPAN ROAD
 MARCH 2016

Concept Option #2

ITEM	DESCRIPTION	ESTIMATED QUANTITY	UNIT	ESTIMATED UNIT COST	TOTAL ESTIMATED COST
On-Site Infrastructure Improvements					
1	General Site Grading	1	LS	\$ 150,000.00	\$ 150,000
2	Roadway Improvements ¹	4,500	LF	\$ 150.00	\$ 675,000
3	Roadway Construction ²	4,000	LF	\$ 275.00	\$ 1,100,000
4	Furnish and Install New 12" PVC Water Main	4,000	LF	\$ 70.00	\$ 280,000
5	Furnish and Install New 12" SDR-21 PVC Gravity Sanitary Sewer Main	4,000	LF	\$ 125.00	\$ 500,000
6	Electric + Transmission line planning/engineering, right of way/easement acquisition (By Utility)	4,000	LF	\$ 50.00	\$ 200,000
7	Natural Gas Main planning/engineering, right of way/easement acquisition (by Utility)	4,000	LF	\$ 50.00	\$ 200,000
8	Telephone and Communications (By Utility)	4,000	LF	\$ 30.00	\$ 120,000
On-Site Infrastructure Subtotal =					\$ 3,225,000
ESTIMATED SUBTOTAL =					\$ 3,225,000
CONTINGENCY (10%) =					\$ 322,500
LEGAL, ENGINEERING & ADMINISTRATION (25%) =					\$ 806,250
ESTIMATED TOTAL CAPITAL COST =					\$ 4,354,000

Notes:

1. Hardpan Road is assumed to be in adequate condition to accept truck traffic. Roadway Improvements consist of storm, striping, new top course asphalt, etc.
2. Roadway Construction includes construction of new roadways through the site.

Section 7: Per Acre Cost Analysis

ANGOLA - HARDPAN ROAD - COST PER ACRE ANALYSIS
MARCH 2016

Generic Environmental Impact Statement (GEIS)

ITEM	DESCRIPTION	ESTIMATED QUANTITY	UNIT	ESTIMATED UNIT COST	ESTIMATED TOTAL COST
1	GEIS	1	EA	\$ 300,000.00	\$ 300,000
				Total GEIS Cost:	\$ 300,000

Infrastructure Construction and Land Acquisition

ITEM	DESCRIPTION	ESTIMATED QUANTITY	UNIT	ESTIMATED UNIT COST	ESTIMATED TOTAL COST
2	Roadway and Utilities	1	EA	\$ 4,245,000	\$ 4,245,000
Infrastructure Construction Subtotal					\$ 4,245,000
3	Construction Contingency	10	%	\$ -	\$ 424,500
4	Legal, Administration, Engineering	25	%	\$ -	\$ 1,061,250
Infrastructure Construction Total					\$ 5,731,000
5	Land Acquisition (County Purchase)	226.00	acres	\$ 7,500.00	\$ 1,695,000
				Total Infrastructure Cost:	\$ 7,426,000

Total Estimated Project Cost:	\$ 7,726,000
Total Acreage:	226.00
Price Per Acre (County cost):	\$ 35,000

Less Anticipated Grants:
Potential Grant (TBD - example only)

\$ (2,000,000)
\$ (2,000,000)
226.00
Net reduction per acre: \$ (8,850)

Note: Gas and electric costs have been included in the total cost per acre for simplicity. Cost sharing options may be available depending on the utility and businesses within the Park.